



Clinical Reminders

Clinician Guide

Revised June 2001



Clinical Desktop Services
Office of Information
Department of Veterans Affairs

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Revision History

Date	Page	Change
3-6/01	8-10, 48-52	Many changes made because of changes in CPRS v. 15
3/19/01	v	New web sites added
5/01		Changes based on PXR*1.5*4

NOTE: Changes are highlighted with a blue vertical bar.

Preface

Related Documentation

Clinical Reminders Installation Guide

Clinical Reminders Manager Manual

Clinical Reminders Quick Reference Card

CPRS Online Help

Clinical Reminders help is included within the CPRS Help files, available from the Help menu in the CPRS GUI. Help can also be accessed on specific Reminders screens with the F1 key.)

Web Sites

Clinical Reminders Page	http://VistA.med.va.gov/reminders
VISN 1 PCE Forum	http://vawww.med.va.gov/visn1
Pain Management Assessment Notebook	http://tspr.vista.med.va.gov/warboard/anotebk
VISN 12 Reminders	http://vaww.visn12.med.va.gov/cprs/Clin_Reminders_Index.htm
VISN 15 Reminders	http://152.131.71.182/CPRSPage/VISN15REMINDERS/VISN15REMINDERS.htm
Mental Health Strategic Health Care Group-Clinical Reminders	http://vaww.mentalhealth.med.va.gov/clinical_reminders.htm
VISTA University CPRS Training	http://vaww.vistau.med.va.gov/VistaU/CPRS/

Introduction

What are Clinical Reminders and what do they do for the Clinician?

- Inform clinicians when a patient is due to receive clinical activity.
- Target the location/provider that best manages the resolution clinical activity.
- Identify patients a reminder “applies” to, based on **VISTA** patient data.
- Identify what clinical activities “resolve or satisfy” the reminder.
- Summarize pertinent patient information to aid the clinician in deciding follow-up activity.
- Allow clinicians to resolve reminders through CPRS.

New Features in Clinical Reminders V. 1.5

New CPRS Reminder *Selection* for the Clinician

- Access to reminder processing from the CPRS Notes and Consults tabs
- Allows multiple reminders to be selected for resolution
 - Reminders Due
 - Reminders Applicable
 - Reminder Categories
 - Reminders Not Applicable
 - All Evaluated Reminders
- Allows selected reminders to be sorted by priority, last occurrence, or date due

New CPRS Reminder *Resolution Processing* for the Clinician

- Provides point-and-click resolution of selected reminders
- Provides finding items (dialogs) unique to the reminder being processed
- Generates progress note and consult text as finding items are checked off, providing a medical legal record
- Updates PCE with appropriate encounter data, providing workload credit
- Provides ability to add orders
- Provides ability to add vital signs
- Provides ability to score and save mental health tests in the mental health package.

New CPRS Reminder *Reference Access* for the Clinician

- Provides right-click reference information for any reminder
 - Clinical Maintenance
 - Education Topic content (when applicable)
 - Reminder Inquiry
- Web links to access supporting web sites, such as the National Clinical Guidelines web site

New Clinical Reminders Features in CPRS V. 15 (patch 85)

Many changes have been made to Reminder Dialog Resolution in CPRS v15 that will make it easier for clinicians to use the dialogs to resolve reminders in Notes or Summaries. These changes are shown and described in the screen captures and instructions throughout this manual.

Personal Preferences

- You can select the clinical reminders you want displayed on the cover sheet through the new GUI Personal Preferences options or through an action on the Reminder Tree Dialog called Edit Cover Sheet Reminder List. These options allow you to:
 - Add or remove reminders
 - Display reminders' desired sequence

Templates and Reminder Dialogs

- Templates can be linked to Reminder Dialogs (parameter-controlled), enabling templates to create orders and enter Vitals, Encounter, and Mental Health information.

Other Changes

- Two new reminders categories are available: Not Applicable & All Evaluated
- You can specify which Categories will be displayed in the Reminder tree view
- You can enter Vitals Date/Time and Service Connected information with a Dialog Visit Info button

Special codes you can use in the default value of Visit Date Prompts:

- 0 - no year is initially set (forces required dates to be entered)
- M - Month is required (just added in v15.6)
- M0 - Month is required, no year initially set (just added in v15.6)

- Required prompts in dialogs are now marked with an *
- You can use Default Outside Location defined in a new parameter
- Non-proportional fonts are now used in reminder dialogs
- Reminder dialog-generated text can be inserted at the current cursor location, rather than at the bottom of the note, if a new parameter is set
- Icon Legend – a non-modal dialog box that shows icons and their meanings can be opened and retained during a working session

Clinical Guidelines Requirements

The National Center for Health Promotion has defined a set of fifteen reminders, which represent a minimum set that sites must report on yearly to comply with congressional law. Each VISN must comply with performance measures that address Prevention Index/Chronic Disease Index (PI/CDI), as well as with the HEALTH PROMOTION AND DISEASE PREVENTION PROGRAM Handbook 1120.2, which states that each VHA facility shall have a program to educate veterans with respect to health promotion and disease prevention and to provide veterans with preventive medical care that includes screening and other clinical services.

You can retrieve a copy of the handbook from the VA publications page.

<http://vaww.va.gov/publ/direc/health/handbook/1120-2hk.doc>

The clinical reminders package offers tools to help clinicians comply with these guidelines on a patient-by-patient basis.

Providers can work with their local ADP coordinators to set up customized reminders based on local and national guidelines for patient education, immunizations, skin tests, measurements, exams, laboratory tests, mental health tests, radiology procedures, and other procedures.

For further information, see the PowerPoint presentation, “Implementing a Clinical Guideline Using Clinical Reminders,” available on the national Clinical Reminders web page

(http://vista.va.med.gov/softserv/clin_bro.ad/clinrem/).

Clinician's Role in Setting up Reminders

Clinicians play a role in the set-up of reminders in the following ways:

1. Defining clinical reminder definitions and using them within Health Summaries, CPRS Cover Sheet, and encounter forms. Clinicians will be asked to assist Clinical Application Coordinators in selecting which reminders to implement and in defining the clinical aspects of the Clinical Reminder definitions, including:
 - Defining Baseline Age Range Set(s)
 - Reminder Frequency
 - Minimum and Maximum Age
 - Defining findings that identify whether the reminder applies to the patient, findings that resolve (satisfy) the reminder, and findings that provide additional clinical information only from the following finding types:
 - Health Factors, Immunizations, Skin Tests, Education Topics, Exams
 - Taxonomies (ICD Diagnosis, ICD0 Operation/Procedure, CPT Procedure ranges)
 - Lab Tests and Radiology Procedures
 - Local Drugs, Generic Drugs and Drug Classes
 - Vital Signs
 - Orders to place
 - Computed Findings to handle miscellaneous findings.
2. Defining and using encounter forms that include findings related to reminders. The clinician plays a major role by appropriately marking encounter forms to reflect clinical interventions. As exams, tests, immunizations, screening, and education are given, the boxes are marked so the information can be entered into the computer by the clinician or clerk, or picked up by scanners and passed on to PCE to satisfy the clinical reminders.
3. Defining and using dialogs to resolve reminders with CPRS GUI: The Clinical Reminders package provides tools for the Clinical Coordinator to define progress note text to represent a reminder's findings. The progress note text is associated with the reminder's findings. Within CPRS GUI, the clinician will have a point-and-click interface (called a "dialog") for each reminder you choose to process. As you select check-boxed text indicating actions you took at a given encounter, text is accumulated to add to the note in progress. When you have finished processing the reminders, encounter information is entered in PCE, orders are placed, vital signs are updated, and mental health tests are scored and stored in the Mental Health package, according to your selections. These dialogs can include *Historical data* for patient visits that occurred sometime in the past (exact time may be unknown) or at some other location (possibly non-VA). This data is used to satisfy reminders and determine the next date due.

Using Clinical Reminders



That's the new clinical reminder. You must be due for a flu shot.

© 1999 *R. A. Nelson*

CPRS and Clinical Reminders

Clinicians can use reminders through CPRS in four places:

- Cover Sheet
- Notes tab
- Consults tab
- Reports tab

Cover Sheet

Clinical reminders are displayed on the cover sheet of CPRS. They can be customized for Site, System, Location, or User. When you click on a reminder, details are presented in a pop-up window.

You can display information within the reminder or see other related information on the cover sheet, such as diagnoses and lab results. A reminders icon (a clock) is in the top bar of the cover sheet. If you click on this icon, information about reminders is also displayed. Details about what's available from the Cover Sheet are provided in the following pages.

Notes tab

When you begin a new progress note, the reminders “drawer” (or button) appears below the templates “drawer,” which is below the list of notes. When you click on this drawer, it opens to show you folders for the reminders that are due, applicable, not applicable, all evaluated reminders, and reminder categories under a folder called Other Categories, if categories have been defined. You can then click on any of these folders to see and process specific reminders for this patient. Details about processing reminders from the Notes tab in a section that follows called Processing Reminders.

Consults Tab

When you begin a new consults note, the reminders drawer appears. It works in a similar way to that described above for progress notes.

CPRS Reports Tab

Health Summaries containing Clinical Reminders can be viewed from the Reports tab in CPRS. See the section on Health Summary later in this guide for more information.

Reminders on CPRS Cover Sheet

The reminders button is on the Patient Information Bar and may be selected from any of the CPRS tabs. When you click on the reminders button, an Available Reminders window opens displaying Due, Applicable, Non-applicable, All Evaluated Reminders, and Other Categories folders. The Due, Applicable, Not Applicable, and All Evaluated folders' reminders are based on the CPRS Cover Sheet reminder list parameter. The reminders in the Other Categories folder are based on the CPRS Look-up Categories parameter.

NOTE: See the Glossary for icon definitions.

VistA CPRS in use by: Green,Joann (DHCPSEVER)

File Edit View Tools Help

NEW PATIENT 333-22-1234 Apr 04, 1911 (88) **8E** Provider: GREEN,JOANN Primary Care Team: Remote Data Attending: Klark,Dic Postings: WA

Reminders button

Active Problems
Coronary Artery Bypass

Allergies / Adverse Reactions
Aspirin
Dust
Flatulations
Codeine

Postings
Allergies
Clinical Warning Jan 06,00
Clinical Warning Apr 06,98
Clinical Warning Mar 31,98

Active Medications
Acetaminophen Tab Non-Verified

Clinical Reminders
Pneumovax DUE NOW
MENTAL HEALTH TESTS DUE NOW
Tobacco Use Screen Apr 16,91
Fecal Occult Blood Test DUE NOW

Due Date

Recent Lab Results
No orders found.

Vitals
PN 99

Appointments / Visits / Admissions
No data found

Reminders box

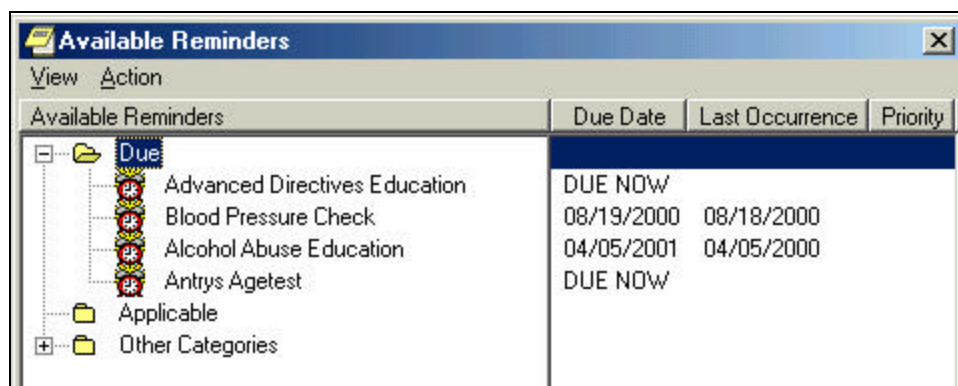
Cover Sheet Problems Meds Orders Notes Consults D/C Summ Labs Reports

NOTE: You can't process reminders from the Available Reminders window. You can, however, review the reminders that are due, applicable, and not applicable to this patient. Coordinators can select the reminder button to quickly refresh dialogs as they build them. You can also now customize the list of reminders that appear on your cover sheet from this window.

Available Reminders Window

Reminders button

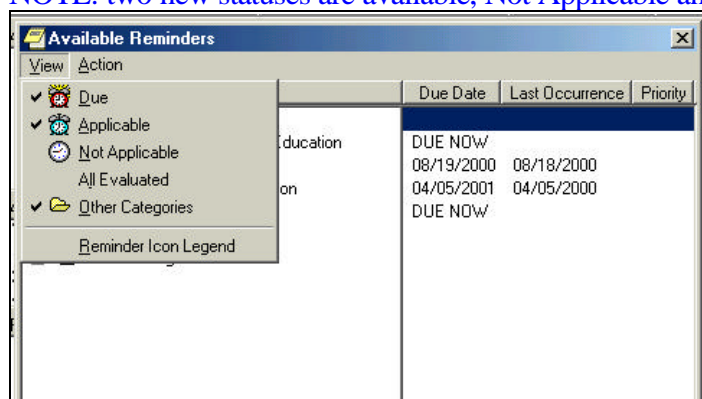
An available reminders window similar to the following opens when you click on the reminders button. It contains two menus: View and Action.



View Menu

The View menu lets you determine which types of reminders will be displayed on the cover sheet.

NOTE: two new statuses are available, Not Applicable and All Evaluated.



Due: The patient meets all the conditions for the reminders and the appropriate amount of time has elapsed. For example, the patient might be a 50-year-old male who has not had a prostate exam in 2 years. A reminder will only be Due if it was Applicable to the patient.

Applicable: The patient meets all the conditions for the reminder, but the appropriate time has not elapsed. For example, a flu shot is given once a year, but it has not been a year yet when a patient comes in for a visit. Although a full year has not elapsed, the patient can still receive a flu shot at this visit.

Not Applicable: The patient doesn't meet all the conditions for the reminders.

All Evaluated: This folder contains all the reminders that have been evaluated for this patient.

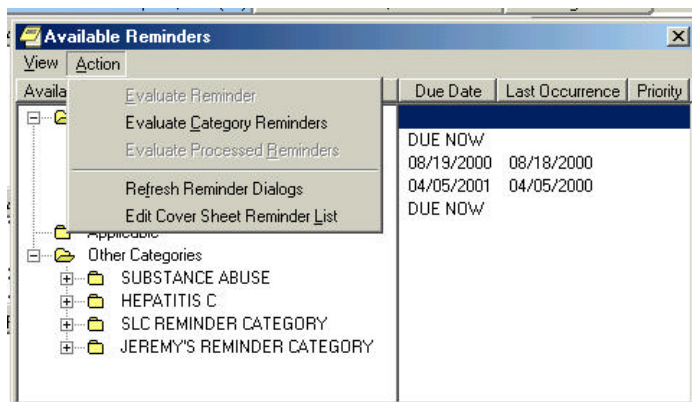
Other Categories: Reminder categories are contained in this folder. Reminder categories can be created to simplify processing; they might include all related reminders for a particular area such as diabetes or substance abuse.

Reminder Icon Legend: If you select the Reminder Icon Legend, the following window pops up. You can leave this window open on your desktop while you work, if desired.



Action Menu

The Action menu has options that let you evaluate reminders or edit the cover sheet reminder list.

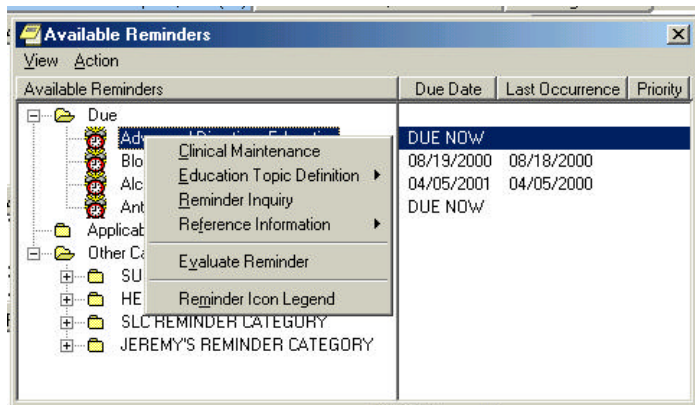


Edit Cover Sheet Reminder List

You can add or remove reminders from the cover sheet with this option. See the section on page 48 for instructions.

Other Cover Sheet Reminder Options

Right-click on a reminder (in the Reminders window or Reminders Button window) to bring up a popup menu with these possible menu items:



These menu items are described on the following pages. The Reminder Icon Legend is shown above, and can be designated to stay on top – visible throughout your CPRS session.

Available Reminders Window

Available Reminders Menu items

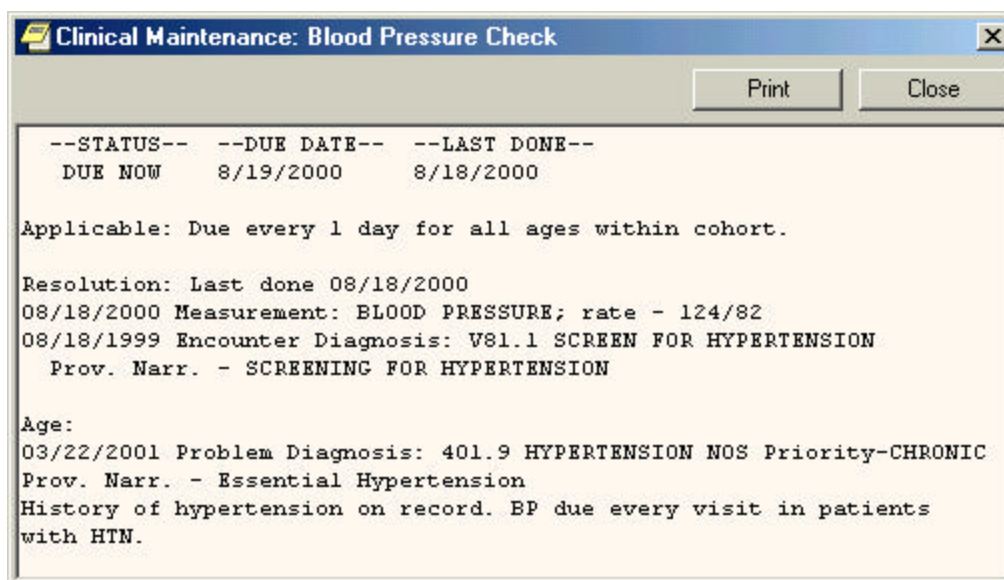
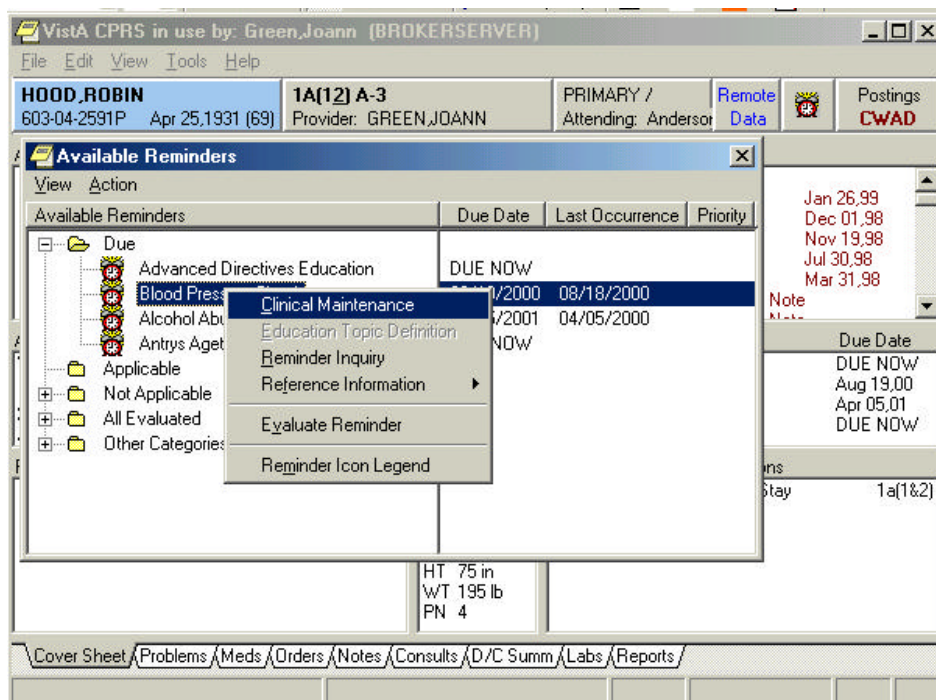
Menu item	Description
Clinical Maintenance	Displays the patient data found based on the reminder definition. This is the same information that is displayed in the Health Summary Clinical Maintenance component.
Education Topic Definition	Lists any education topics that have been defined for a reminder. You can select a topic to view the desired education outcome and standards. If no education topics are related to this reminder, this menu item can't be selected.
Reminder Inquiry	Displays the reminder definition.
Reference Information	Lists web sites that may be selected for additional reference information.
Evaluate Reminder	Evaluates the reminder based on current patient data. The reminder is added to the Due, Applicable, or Not Applicable folder, as appropriate. The Reminder will also be added to the All Evaluated folder.
Reminder Icon Legend	If you click on this, you can keep a window open that defines the icons used by reminders and templates.

Each of these menu items will bring up a window. These are described on the following pages. When you are finished with the window, click Close.

Available Reminders Window

Clinical Maintenance

When you select Clinical Maintenance from the right-click menu, a window pops up showing the possible resolutions and findings associated with the reminder. Clinical maintenance status definitions are listed on the next page.



Clinical Maintenance Reminder Statuses

Clinical Reminder Statuses

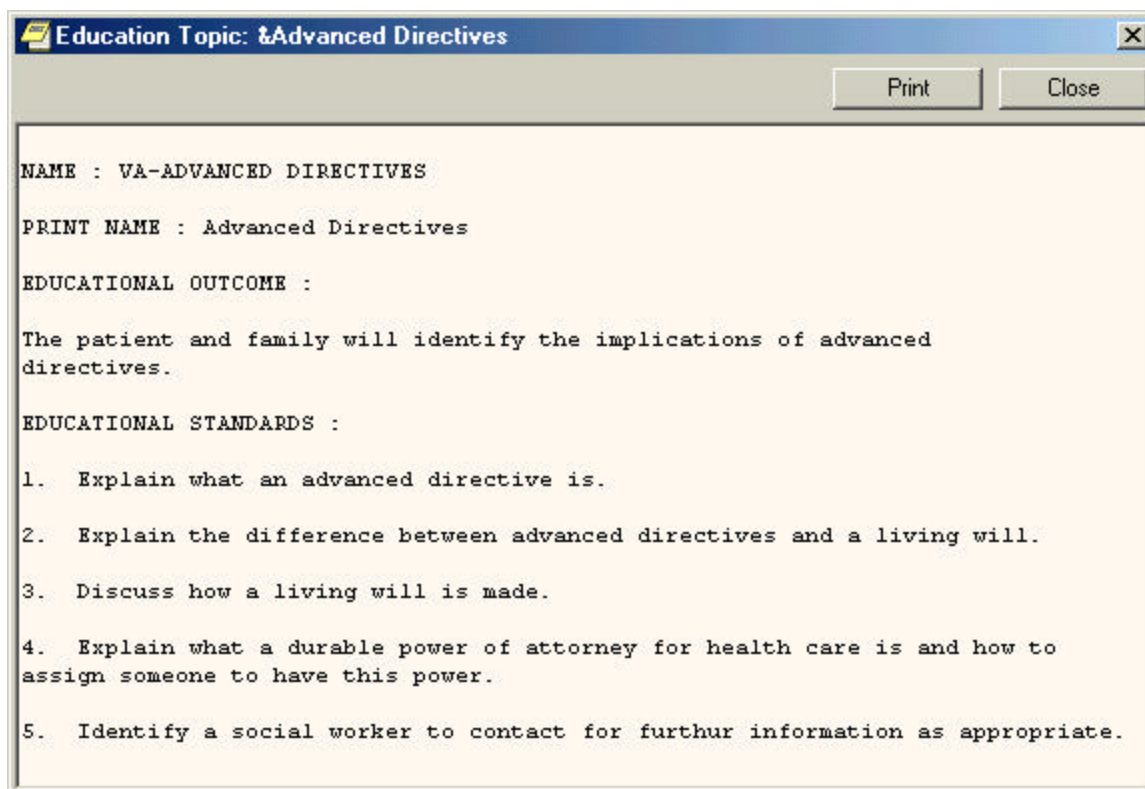
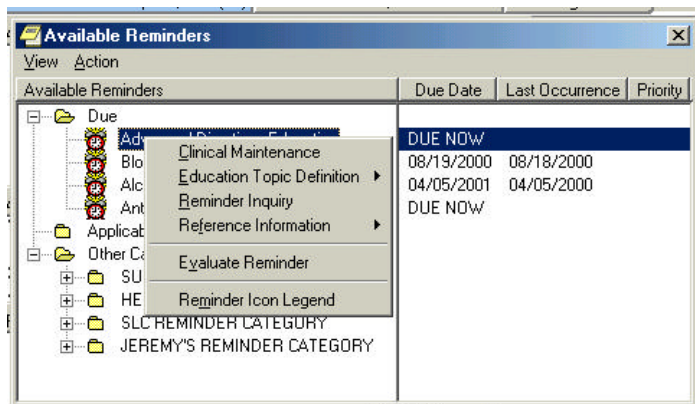
When you look at the reminder output in CPRS and in Health Summaries, you will see a reminder status. The status is determined by evaluation of the PATIENT COHORT LOGIC and/or RESOLUTION LOGIC. The descriptions in the table below explain what each of the possible statuses mean.

Status	Description
DONE	When the final frequency for a reminder is 99Y (99 years), it is done once in a lifetime. When reminders with this frequency are resolved, they have the special status of DONE.
DUE NOW	There are two conditions that can make a reminder DUE NOW. The first is when the reminder has never been resolved in the past. The second is when the reminder has been resolved in the past but the amount of time specified by the final REMINDER FREQUENCY has been met or exceeded. For example, if the reminder was last resolved 18 months ago and the frequency is one year, the reminder is DUE NOW. If the frequency was 2 years, the status would be RESOLVED.
DUE SOON	The field DO IN ADVANCE TIME FRAME is used to let a reminder become due earlier than the date determined, by adding the frequency to the date when the reminder was last resolved. For example, if the frequency is 1Y (one year) and the DO IN ADVANCE TIME FRAME is 1M (one month), the reminder would have a status of DUE SOON beginning 11 months after it was last resolved. After one year has passed, the status would be DUE.
ERROR	This status is returned when there is an error that prevents the reminder from being properly evaluated. Depending upon how a site chooses to set things up, a MailMan message containing details of the error will be sent either to a mailgroup or the user. The error will also be put into the error trap.
N/A	A reminder is N/A (non-applicable) if the patient is not in the cohort or group of patients to which this reminder applies. The PATIENT COHORT LOGIC provides a precise description of the cohort. Examples of Findings that can be used to determine the cohort include sex, age, and diagnosis. The remaining resolution statuses apply only to reminders that are applicable.
NEVER	This status applies only to reminders that are resolved by an immunization. Immunizations can be marked as contraindicated in the V IMMUNIZATION file. When this is the case, the reminder will have the status of NEVER.
RESOLVED	A reminder is given a status of RESOLVED when all the criteria in the RESOLUTION LOGIC have been met and the amount of time specified by the reminder frequency has not passed. The criteria can be simple, such as having an immunization, or complex, such as an order for an inhaler and inhaler use education.

Available Reminders Window

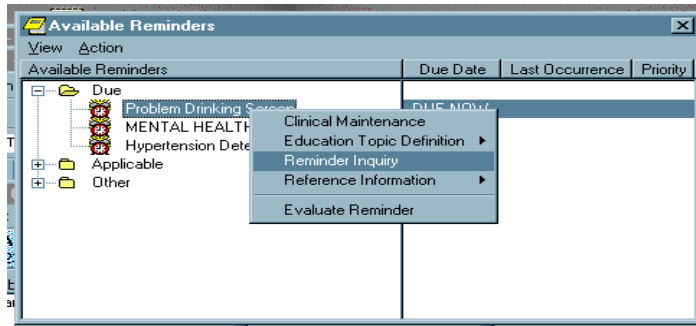
Education Topic Definition

When you select this menu item, a popup window displays any education topics that have been defined for a reminder. You can select a topic to view the desired education outcome and any standards. If no education topics are related to this reminder, this menu item can't be selected.



Available Reminders Window

Reminder Inquiry



When you select this menu item, a popup window displays the reminder definition describing the criteria that determine which patients are selected for this reminder.

Available Reminders Window

Reminder Inquiry: Advanced Directives Education

Print Close

VA-ADVANCED DIRECTIVES EDUCATION No. 34

Print Name: Advanced Directives Education

Related VA-* Reminder:

Reminder Dialog:

Priority:

Reminder Description:
Advanced directives information given to all patients once.

Technical Description:

This reminder is distributed with the PCE package. The source of this reminder definition is the Ambulatory Care Expert Panel. It is based on feedback from facilities wanting to track Advanced Directive Education.

This reminder is an education type reminder. It relies on an active education topic entry representing the Advanced Directives education in the Education Topics file.

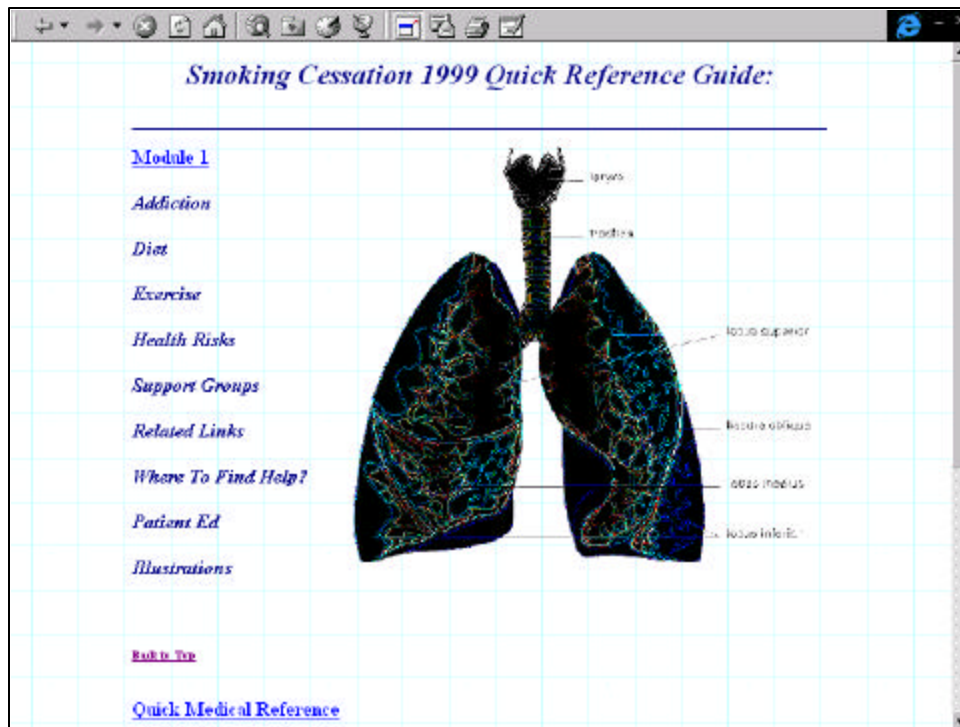
This reminder will be considered "DUE NOW" if there is no patient education entry for advanced directive education in the "V Patient Ed." file. The V Patient Ed. File summarizes the patient education provided by clinicians at an encounter/visit.

By recording the education topic given at an encounter via a scanned encounter form (or other interface to PCE), the reminder will be considered "not indicated". Historical patient education for advanced directives can be recorded in the PCE User Interface to make the reminder not indicated.

Available Reminders Window

Reference Information

When you select this menu item, it lists web sites, if they have been entered at your site. One of these may be selected for additional reference information, such as the following:

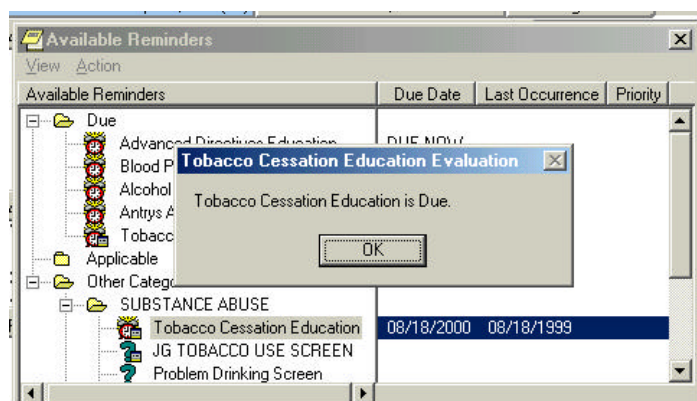
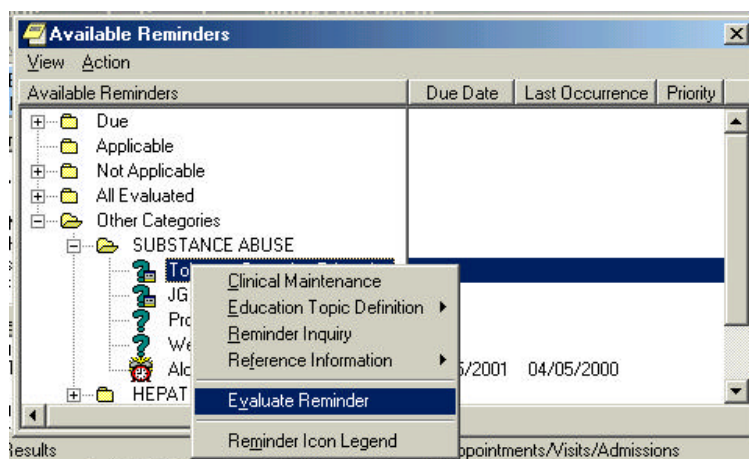


Available Reminders Window

Evaluate Reminder

Before you process reminders, you may selectively evaluate reminders. The Other Categories folder, in the Available Reminders Window, contains reminder category folders and reminders that may not have been evaluated as part of the CPRS Cover Sheet Reminder list.

To evaluate reminders, right-click on a category or reminder and select the Evaluate Reminder menu item. The reminder(s) will be added to the Due, Applicable, or Not Applicable folder, based on the evaluation results, as appropriate. It will also be added to the All Evaluated folder.



NOTE: There are two forms of Reminder Evaluation, for use before and after processing reminders. See page 28 for instructions on evaluating reminders after processing them.

Reminder Processing from Notes Tab – Summary of Steps

Summary

These are the basic steps to process reminders from the Notes tab in CPRS. These steps are described in more detail on the following pages.

1. **Start a new progress note.** To process a reminder, start a new progress note. When you begin a new progress note, the reminders drawer appears.
2. **Open the reminders drawer.** When you click on the reminders drawer, you see several folders containing reminders for this patient. Possible folders include Due, Applicable, Not Applicable, All Evaluated, and Other Categories. These folders may contain a hierarchy of folders and reminders within folders. The view of folders is customizable by you or your Reminders Manager. The folders and subfolders in the Reminders Drawer are sometimes called the “tree view.”
3. **Choose a reminder.** Open a folder (if necessary) and click a reminder that you wish to process. At this point, you may be asked to provide the primary encounter provider, so that any PCE data entered from reminder dialog processing can be saved. If the reminder has an associated reminder dialog, a small dialog icon is shown in the bottom-right corner of the clock icon. If you click on one of these reminders, a dialog box appears, which lists possible actions or activities that may satisfy this reminder. The contents of this dialog have been created at your site by your Clinical Application Coordinator (CAC) or a Clinical Reminders Manager. Clinicians should be involved with defining these dialogs.
4. **Complete the dialog box.** The dialog box lists possible actions or interventions that may be taken to satisfy this reminder. As you make selections from the dialog box, you can see the text of the progress note below the Clear, Back, and Next buttons. Below the progress note text area is the encounter information including orders and PCE, Mental Health, and Vital Sign data. The bold text in these areas applies to the specific reminder you are processing. You can process multiple reminders.

Clinicians will be able to establish their own workflow by clicking on buttons in the dialog box.

Next and Back processing. Use the Next or Back buttons to take you to the dialog for the next or previous reminder due in the reminders drawer.

Clinical Maintenance review. While processing the reminder, you can review current Clinical Maintenance patient data related to the reminder by clicking on the Clinical Maint button at the bottom of the dialog box.

Reminder Processing - Summary

Clearing a single reminder. You will probably process several reminders for a single visit. If you have entered information on a reminder, but you need to start over on that reminder only, you can simply click on the reminder from the reminders drawer, then click the Clear button in the reminders dialog box. This removes the entries you have and lets you start again on this one reminder.

Canceling out of processing reminder dialogs. If you reach the reminders processing dialog by mistake or if you have entered information for reminders but you need to get rid of that information and start over, simply click Cancel.

- 5. Expanded dialog boxes.** Clicking a checkbox may bring up additional choices: an area for comments, a diagnosis to choose, or other information that may satisfy the reminder.

Dialog with orders. Reminder dialogs can include orders. If quick orders are included in the dialog, these are placed as soon as the reminder processing is finished and the orders are signed. If the order requires more information before releasing the order, an order dialog will appear after you click Finish, allowing you to complete the order.

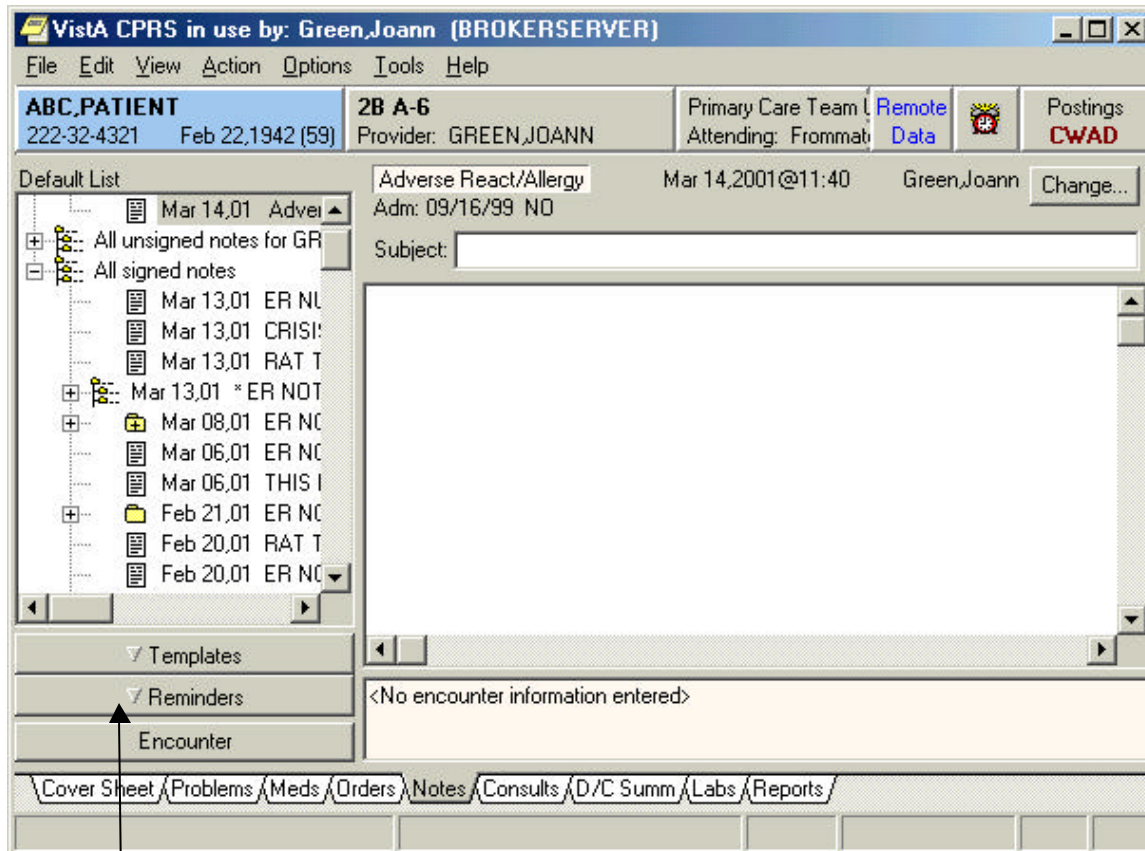
Mental health tests. Reminder dialogs can include a pre-defined set of mental health tests. The reminder definition can include any mental health test, but the reminder dialog is limited in the GUI resolution process to allow clinicians to enter results for the following tests: AIMS, AUDC, AUDIT, BDI, CAGE, DOM80, DOMG, MISS, and ZUNG. Progress note text can be generated based on the mental health score.

- 6. Finish processing the reminder and complete your note.** Click on the Finish button when you have checked all the appropriate checkboxes for each reminder you wish to process. You then go back to the Note window, where you can review and edit the reminder dialog progress note text added to your note. After processing reminders, you can make other comments in the note and have a completed progress note for the encounter.
- 7. (Optional) Evaluate processed reminders.** You can use the Action menu to select the Evaluate Processed Reminders menu item from the Reminders Available window, to ensure that the reminders are satisfied. This action will evaluate the reminders that you processed while you wait, and update the Reminders Available window and reminders drawer lists to reflect the new statuses.

Reminder Processing – Detailed Instructions

1. Start a new progress note.

When you begin a new progress note, the reminders “drawer” appears below the default list of notes. You will be prompted to enter Progress Note properties (Title, date, etc.) before you begin processing reminders.

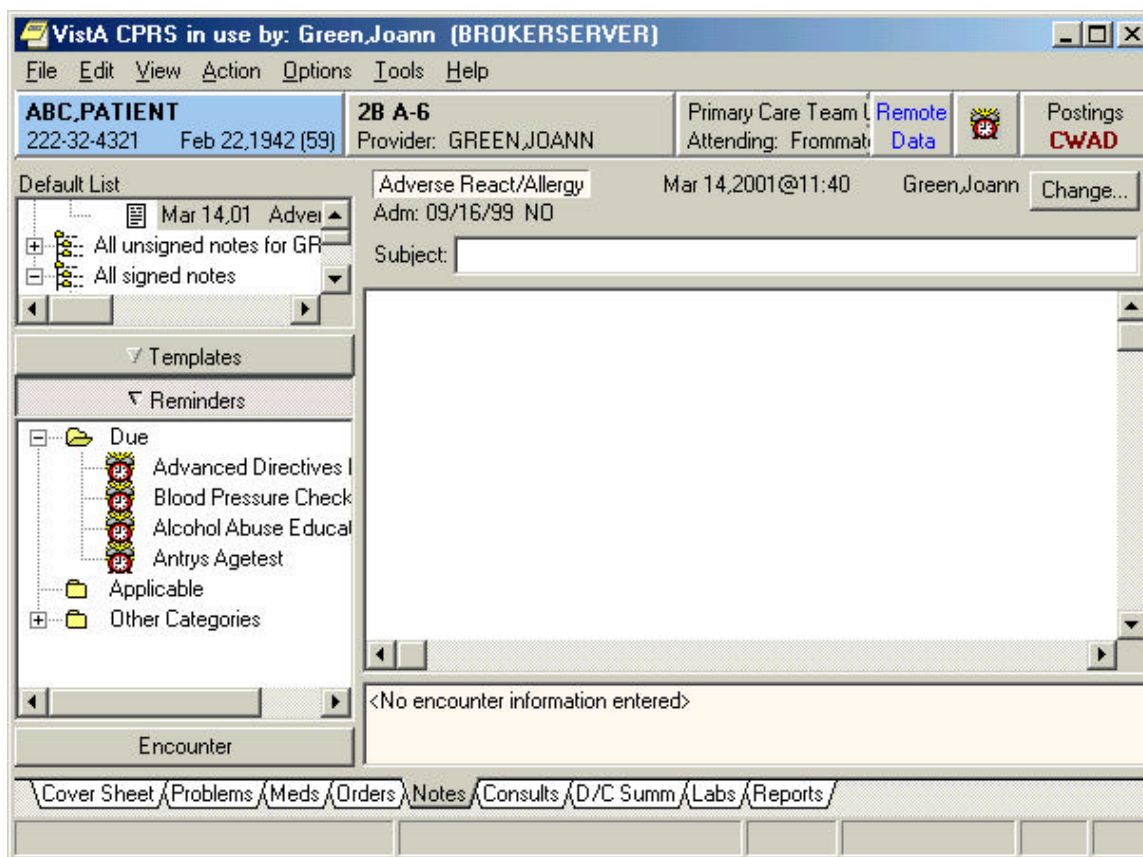


Reminders
Drawer

Reminder Processing

2. Open the reminders drawer

Click on the reminders drawer (button) to see reminders. Due, Applicable, Not Applicable, All Evaluated, or Other Categories folders may be displayed, enclosing those kinds of reminders. You or your site can determine the folder view, and whether the folders are open or closed when you first open the reminders drawer.



See the Glossary for definitions of Due, Applicable, etc.

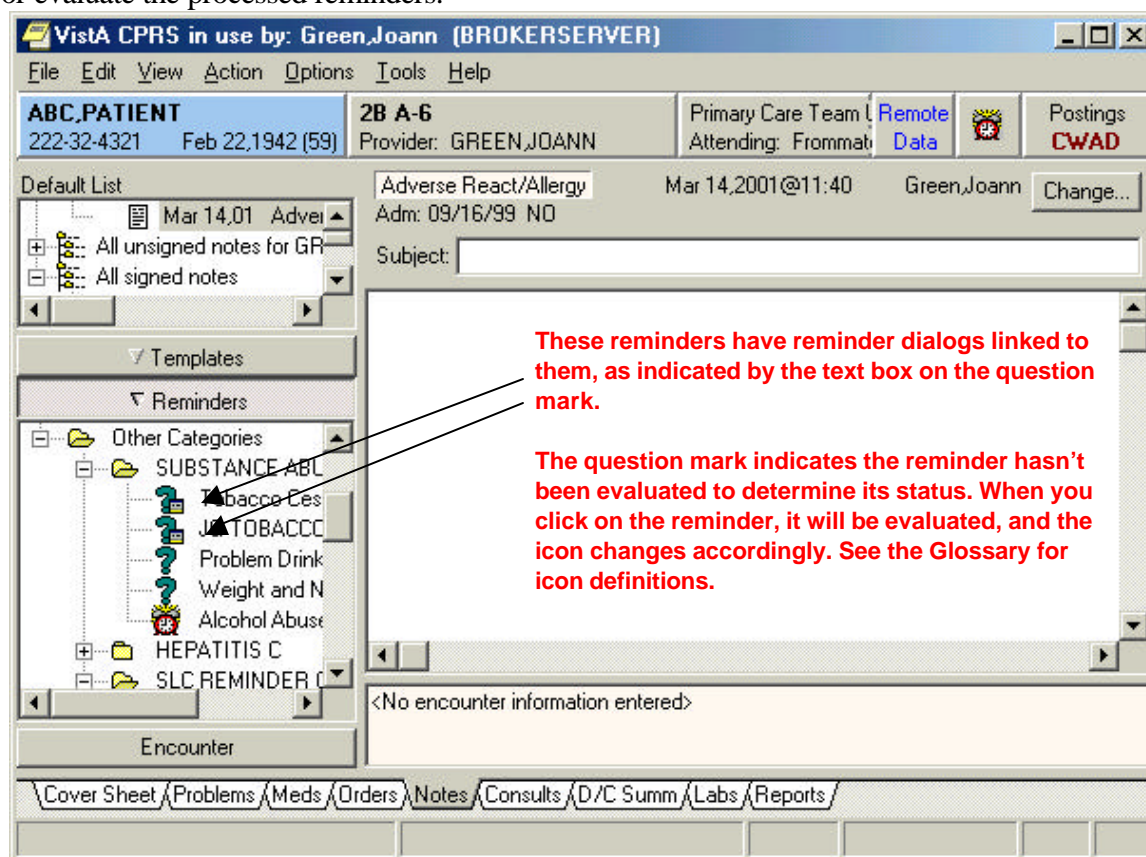
Reminder Processing

3. Choose a reminder.

Open a folder (Due, Applicable, Other Categories, etc.) and click on the reminder you wish to process. The Other Categories folder may contain folders for categories that have been created at your site.

To process a reminder, a “reminder dialog” must be defined and associated (linked) with the reminder. This is done by your Clinical Reminders Manager or coordinator (usually with clinician assistance). If a reminder dialog is available for a reminder, an icon representing a dialog is on the corner of the clock.

If the reminder has already been processed by a CPRS GUI reminder resolution process, a checkmark is shown over the dialog icon. The checkmark goes away when you select a patient or evaluate the processed reminders.



Reminder Processing

4. Complete the dialog box.

When you select a reminder to process, a dialog box appears, such as the one below. It shows the possible things that may satisfy the reminder.

Many items will expand – open new dialog boxes – to elicit more information, such as dates, locations, diagnoses, test results, or whatever else the reminders need. These dialog items are based on guidelines at your site and how your Reminders coordinators or managers created the reminders and dialogs. See the next page for an example of an expanded box.

When you click a checkbox or item, the associated text that will be placed in the progress note is shown in the area below the buttons. Data that will update PCE, orders, Vital Signs, and Mental Health packages for the item will be placed in the area below that.

Reminder Resolution: JG TOBACCO USE SCREEN

☒ Patient had tobacco use screening at this encounter.
Level of Understanding: {None selected} [v]
Comment: [text box]
☐ Didn't smoke at the visit. ☐ Smoked at Visit.
☐ Patient received tobacco use screening at another facility.
☐ Patient declined tobacco use screening at this encounter.
☒ Exercise counseling codes
☒ This encounter ☐ Primary Diagnosis
Comment: [text box]
☐ Add to Problem List
☐ Previous encounter

Clear Clinical Maint Visit Info < Back Next > Finish Cancel

GREEN NOTES
JG TOBACCO USE SCREEN:
Patient had tobacco use screening at this encounter.
Exercise counseling codes
This encounter

Diagnoses: EXERCISE COUNSELING
Patient Educations: Tobacco Use Screening

* Indicates a Required Field

Reminder resolution dialog

Progress Note text

Data that will update PCE, orders, Vital Signs, and Mental Health packages.

An asterisk next to a checkbox indicates that it is necessary to enter a response. This is determined by the reminders manager or coordinator when creating the dialog.

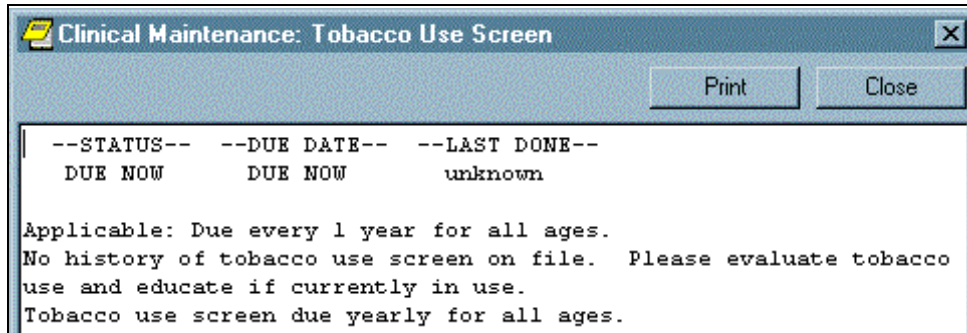
Next and Back processing

Use the Next button to process the next reminder that is due in the reminders drawer. Use the Back button to take you to the reminder processed previously to the one you are currently processing.

Reminder Processing

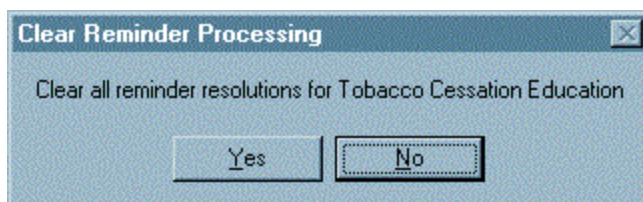
Clinical Maintenance review

While processing the reminder, you can review current Clinical Maintenance patient data related to the reminder by clicking on the Clinical Maint button at the bottom of the dialog box.



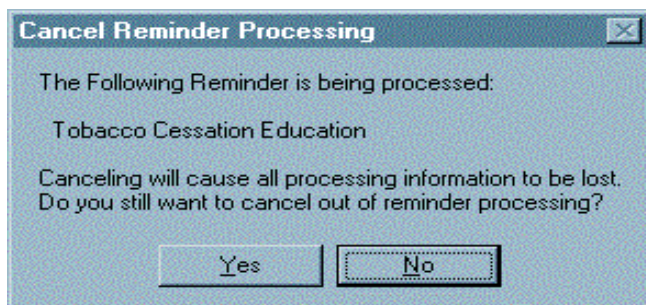
Clearing a single reminder

You will probably process several reminders for a single visit. If you have entered information on a reminder, but you need to start over on that reminder only, you can simply click Clear on the reminder from the reminders drawer, then click the Clear button in the reminders dialog box. This removes all previous dialog selections from the reminder's dialog box and removes the related text and data from the Progress Note text box and the PCE data box for this reminder. You can now start processing again. NOTE: Clicking Clear will remove the information from only one reminder. Be careful that you are on the correct reminder before you click Clear.



Canceling out of the Processing dialog

If you reach the Reminders Processing dialog by mistake or you wish to delete information that you have entered and start over, click Cancel. NOTE: If you click Cancel, you will lose all of the information for reminders that you have entered.



Reminder Processing

5. Expanded dialog boxes

Some statements in a dialog generate a new set of checkboxes, such as the one below about Hepatitis C diagnosis, which allows you to select a diagnosis and add it to the problem list. Also, note that orders can also be placed, such as the lab test and Hepatitis C Antibody.

Reminder Resolution: Hepatitis C Risk Assessment

☐ Patient refused to complete screening tool.
☐ Patient has risk factor for hepatitis c recorded.
☐ Patient denies risk factors for Hepatitis c.
☒ Patient has a diagnosis of hepatitis C
☐ Current hepatitis C diagnosis
☒ Patient has been previously diagnosed with hepatitis C
Selectable Diagnoses: Chronic Hepatitis C W/O Mention Of Hepatic Coma (070.54)
Date: April 1, 1999 Location: West-Palm, FL
Comment: Verified by review of West-Palm Beach Va's records via Remote Data
☐ Primary Diagnosis ☒ Add to Problem List
☐ HCV RNA Qualitative lab test was ordered.
☐ HEPATITIS C ANTIBODY Ordered.

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL ACTIVITY-
Hepatitis C Risk Assessment:
Patient has a diagnosis of hepatitis C
Patient has been previously diagnosed with hepatitis C
Selectable Diagnoses: Chronic Hepatitis C W/O Mention Of Hepatic Coma (070.54)
Date: April 1, 1999
Location: West-Palm, FL
Comment: Verified by review of West-Palm Beach Va's records via Remote Data

Diagnoses: CHRONIC HEPATITIS C W/O MENTION OF HEPATIC COMA (Historical)

Expanded box that allows diagnostic codes to be added.

Orders added

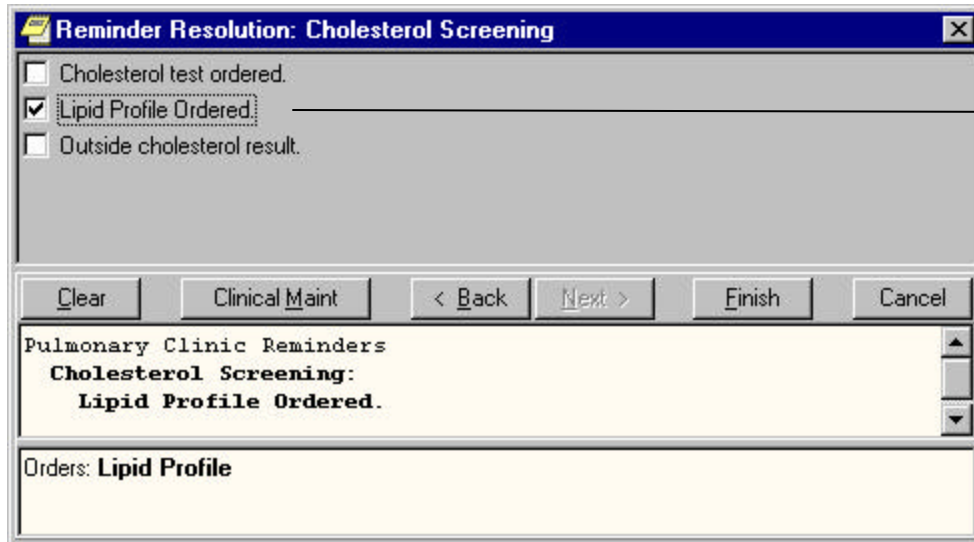
Text that will be added to Progress Note

Data that will update PCE, orders, Vital Signs, and Mental Health packages.

Reminder Processing

Reminder dialog with orders

Reminder dialogs can include orders, as in the example below:



Reminder Resolution: Cholesterol Screening

☐ Cholesterol test ordered.

☒ Lipid Profile Ordered.

☐ Outside cholesterol result.

Clear Clinical Maint < Back Next > Finish Cancel

Pulmonary Clinic Reminders

Cholesterol Screening:
Lipid Profile Ordered.

Orders: **Lipid Profile**

When you check these boxes, orders are placed

If quick orders are included in the reminder dialog, these are activated as soon as the progress note is completed and the note and order are signed. If the order requires more information before completion, an order dialog will appear after you click Finish, allowing you to complete the order.

Reminder Processing

Mental health tests

Dialogs for mental health tests can be set up for your site's use. A reminder definition can include any mental health test, but the reminder GUI resolution process will currently only work with the following tests: AIMS, AUDC, AUDIT, BDI, CAGE, DOM80, DOMG, MISS, and ZUNG

The dialog box is titled "Reminder Resolution: Mental Health Test". It contains a list of mental health tests with checkboxes and "Perform" buttons. The tests listed are AIMS, AUDC TEST, AUDIT, BDI, CAGE, DOM80, and DOMG. Below the list is a section for "General Assessment of Function" with a "GAF Score" field set to 0 and a "Reference Info" button. At the bottom are navigation buttons: Clear, Clinical Maint, Visit Info, < Back, Next >, Finish, and Cancel. Below the buttons is a "GREEN NOTES" section with the text "Mental Health Test: CAGE (Mental Health Instrument)". At the bottom is a "Health Factors" section with the text "ACTIVATE BREAST CANCER SCREEN". A footnote at the bottom left states "* Indicates a Required Field".

Pressing the Perform button causes the mental health test dialog to appear

The dialog box is titled "CAGE". It contains a list of four questions with "Yes" and "No" checkboxes. The questions are: "Have you ever felt you should cut down on your drinking?", "Have people annoyed you by criticizing your drinking?", "Have you ever felt bad or guilty about your drinking?", and "Have you ever had a drink first thing in the morning to steady your nerves or to get rid of a hangover (an eye opener)?". At the bottom are buttons for Clear, OK, and Cancel.

Reminder Processing

Mental health, cont'd

After the test questions have been answered, appropriate text (including the test score) for the test is entered into the progress note.

Reminder Resolution: Alcohol Abuse Education

☐ Patient is a non-drinker.
☐ Patient drinks alone
☐ Patient is a binge drinker.
☒ CAGE test was given. **Perform CAGE**

Clear Clinical Maint < Back Next > Finish Cancel

Alcohol Abuse Education:
CAGE test was given.
An alcohol screening test (CAGE) was negative (score=1).

Mental Health: CAGE

Mental Health
Result Text

VistA CPRS in use by: Green,Joann (DHCP SERVER)

File Edit View Action Options Tools Help

NEW PATIENT 333-22-1234 Apr 04, 1911 (89) 8E Provider: GREEN,JOANN Primary Care Team Unassisted Remote Data Postings WA

Default List PATIENT EDUCATION May 03, 2000@09:29 Green,Joann Change...

May 03, 00 PATIENT ED Vst: 04/16/90 8E REHAB MED
May 02, 00 PATIENT ED
May 02, 00 PATIENT ED
Mar 24, 00 PATIENT ED
Jan 06, 00 CLINICAL W.
Jun 17, 99 Cardiology N
Jun 11, 99 MEDICINE C
May 02, 99 PATIENT ED
Jul 06, 98 MEDICINE C
Jun 18, 98 MEDICINE C
Jun 18, 98 CARDIOLOG
Jun 11, 98 MEDICINE C
Apr 23, 98 Joel's Test N
Apr 06, 98 CLINICAL W.
Mar 31, 98 + CLINICAL V
Mar 31, 98 + PATIENT E
Feb 02, 98 + PULMONA
Jun 10, 91 Final Dischar
May 28, 91 General Note

Subject: [Empty]

This Patient Education is for NEW PATIENT.

GREEN NOTES
Mental Health Test:
CAGE (Mental Health Instrument)
An alcohol screening test (CAGE) was negative (score=1).

<No encounter information entered>

Templates Reminders Encounter

Cover Sheet Problems Meds Orders Notes Consults D/C Summ Labs Reports

Reminder Processing

6. Finish processing the reminder

After you have entered all the information, you can finish processing the reminders. When you finish, the following things will happen:

- The predefined text is placed in the note you have begun writing.
- The encounter information is sent to PCE.
- Mental health test results are filed with the Mental Health package.
- If there are orders defined in the dialog, it will also create the orders. If the orders require input (if they are not predefined quick orders without prompts), the order dialogs will come up so that you can complete the orders. You will then have to sign any orders that are created.

To finish processing reminders, click Finish.

Reminder Resolution: Tobacco Cessation Education

☒ Patient had tobacco use screening at this encounter.
Level of Understanding: (None selected)
Comment: Didn't smoke at the visit.

☒ Didn't smoke at the visit. ☐ Smoked at Visit.

☐ Patient received tobacco use screening at another facility.
☐ Patient declined tobacco use screening at this encounter.
☒ Patient had smoking cessation education at this encounter.
Level of Understanding: Good
Comment:

☐ Patient received smoking cessation education outside the VA.

Clear Clinical Maint Visit Info < Back Next > **Finish** Cancel

GREEN NOTES
Tobacco Cessation Education:
Patient had tobacco use screening at this encounter.
Comment: Didn't smoke at the visit.
Patient had smoking cessation education at this encounter.

Patient Educations: **Smoking Cessation, Tobacco Use Screening**

* Indicates a Required Field

Finish Button

Reminder Processing

After you click Finish, you are returned to the Note screen, where you can see the text created by reminder processing. You can edit this, as necessary.

VistA CPRS in use by: Green,Joann (DHCPSEVER)

File Edit View Action Options Tools Help

NEW PATIENT 333-22-1234 Apr 04,1911 (89) 8E Provider: GREEN,JOANN Primary Care Team L Remote Data Postings WA

Default List PATIENT EDUCATION Jun 14,2000@08:36 Green,Joann Change...

Vst: 04/16/90 8E R

Subject:

This Patient Education is for NEW,PATIENT.

GREEN NOTES

Tobacco Cessation Education:

Patient had tobacco use screening at this encounter.
Level of Understanding: Good

Patient had smoking cessation education at this encounter.
Level of Understanding: Good

Templates Reminders Encounter

Cover Sheet Problems Meds Orders Notes Consults D/C Summ Labs Reports

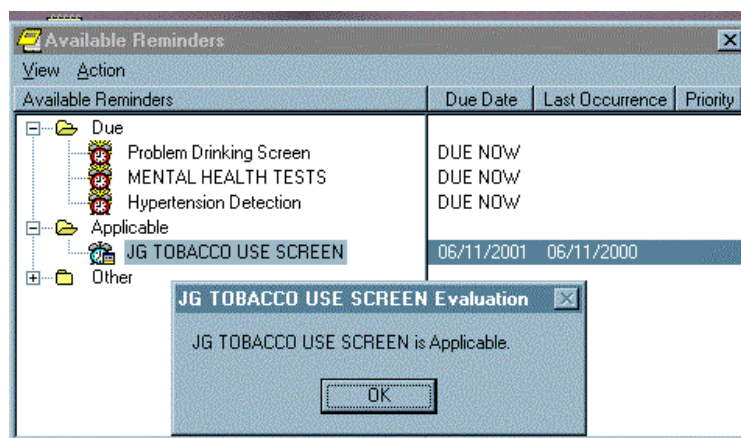
Reminder Processing

7. (Optional) Evaluate processed reminders

After you have processed a reminder, you can use this menu item in the Available Reminders window to see if your actions during the encounter satisfied the reminder. This action will evaluate the reminders that you processed while you wait, and update the Reminders Available window and Reminders drawer lists to reflect the new statuses.

NOTE: PCE data may take a few minutes to be correctly recorded. Please wait a few minutes after processing a reminder before evaluating it again to ensure that it was satisfied.

To evaluate processed reminders, go to the Available Reminders dialog by clicking on the Reminders button, choose Action, and then click on Evaluate Processed Reminders.



Please refer to page 11 or the glossary for definitions of Clinical Maintenance reminder statuses.

Reminders and Health Summary

Reminder items are added to health summary selection components for a given health summary type. When the health summary type is run, the Clinical Reminders software evaluates the patient's data and returns the results to the health summary for display. Health summaries and reminder definitions can be tailored to suit clinicians' needs.

Health Summary Reminder Components

- ◆ *Reminder Due*: an **abbreviated** component indicating only **what is due now**.

Example of *Reminder Due* as displayed on a health summary:

	--STATUS--	--DUE DATE--	--LAST DONE--
Advanced Directives Education	DUE NOW	DUE NOW	unknown
Alcohol Abuse Education	DUE NOW	DUE NOW	unknown

- ◆ *Reminder Summary*: this provides the status, the next due date, and the last done date.

Example of *Reminder Summary* as displayed on a health summary:

	--STATUS--	--DUE DATE--	--LAST DONE--
Mammogram	RESOLVED	05/01/2000	10/01/1999
Pap Smear	DUE NOW	06/01/2000	unknown
Diabetic Eye Exam	DUE NOW	06/01/2000	06/01/1999

- ◆ *Reminder Maintenance*: this component provides:
 1. Details about what was found from searching the **VISTA** clinical data.
 2. Text related to the findings found or not found (as defined in the reminder). This includes taxonomies (ICD or CPT codes), health factors, and test results related to the reminder and computed findings (e.g., Body Mass Index).
 3. Final frequency and age range used for the reminder.

NOTE: Statuses include "DUE SOON," to allow you to process a reminder in advance, if convenient.

Example of *Reminder Maintenance* as displayed on a health summary:

----- CM - Reminder Maintenance -----			
	--STATUS--	--DUE DATE--	--LAST DONE--
Fecal Occult Blood Test	DUE NOW	DUE NOW	unknown
Applicable: Due every 1 year for ages 50 and older.			
No HX of colorectal cancer on file - presumed no HX.			
Health Factor Test	DUE NOW	DUE NOW	unknown
Applicable: Due every 1 year for ages 40 to 60.			
Baseline set to 1Y for 40-60.			

Reminders and Health Summary

Example

```
06/14/2000 09:44
***** CONFIDENTIAL REMINDERS TEST (2) SUMMARY *****
DISABILITIES,RATED 291-88-8299 1A DOB: 02/11/1923

----- CS - Reminders Summary -----
The following disease screening, immunization and patient education
recommendations are offered as guidelines to assist in your practice.
These are only recommendations, not practice standards. The
appropriate utilization of these for your individual patient must be
based on clinical judgment and the patient's current status.

--STATUS-- --DUE DATE-- --LAST DONE--
Diabetic Foot Exam RESOLVED 06/13/2001 06/13/2000

----- CR - Reminders Due -----
The following disease screening, immunization and patient education
recommendations are offered as guidelines to assist in your practice.
These are only recommendations, not practice standards. The
appropriate utilization of these for your individual patient must be
based on clinical judgment and the patient's current status.

--STATUS-- --DUE DATE-- --LAST DONE--
Advanced Directives Education DUE NOW DUE NOW unknown
Alcohol Abuse Education DUE NOW DUE NOW unknown
Exercise Education DUE NOW DUE NOW unknown
Seat Belt Education DUE NOW DUE NOW unknown
Tobacco Cessation Education DUE NOW DUE NOW unknown

----- CM - Reminder Maintenance -----
The following disease screening, immunization and patient education
recommendations are offered as guidelines to assist in your practice.
These are only recommendations, not practice standards. The
appropriate utilization of these for your individual patient must be
based on clinical judgment and the patient's current status.

--STATUS-- --DUE DATE-- --LAST DONE--
Cholesterol Screen (Male) N/A unknown
Applicable: Due every 0Y - Not Indicated for all ages.

Fecal Occult Blood Test DUE NOW DUE NOW unknown
Applicable: Due every 1 year for ages 50 and older.

Flexisigmoidoscopy DUE NOW DUE NOW unknown
Applicable: Due every 1 year for ages 50 and older.
SIG due every 5 years for patients 50 and older, or FOBT annually.

Press <RET> to continue, ^ to exit, or select component: <Enter>
```

Reminders and Health Summary

Example, cont'd

```
06/14/2000 09:44
***** CONFIDENTIAL REMINDERS TEST (2) SUMMARY *****
DISABILITIES,RATED 291-88-8299 1A DOB: 02/11/1923

----- CM - Reminder Maintenance -----
              (continued)

              --STATUS-- --DUE DATE-- --LAST DONE--
Hypertension Detection      DUE NOW    05/12/2000    05/12/1998
  Applicable: Due every 2 years for all ages.
  Resolution: Last done 5/12/1998
  5/12/1998 Measurement: BLOOD PRESSURE; rate - 140/85
  Date of last ICD or CPT coded hypertension screen unknown.

Influenza Immunization      DUE NOW    DUE NOW    unknown
  Applicable: Due every 1 year for ages 65 and older.
  Influenza vaccine due yearly in patients ages 65 and older.

Pneumovax                  DUE NOW    DUE NOW    unknown
  Applicable: Due every 99Y - Once for ages 65 and older.
  Pneumovax due once for patients 65 and over.

PPD                        N/A
  Applicable: Due every 0Y - Not Indicated for all ages.
  Patient may be low risk for TB, where PPD may not be indicated.
  No HX of TB or positive PPD diagnosis on file.
  Last date of PPD not known.  educate if currently in use.

Problem Drinking Screen      DUE NOW    DUE NOW    unknown
  Applicable: Due every 1 year for all ages.
  Screen for alcohol problems yearly for all patients.

Tobacco Use Screen          DUE NOW    DUE NOW    unknown
  Applicable: Due every 1 year for all ages.
  No history of tobacco use screen on file.  Please evaluate tobacco
  use and educate if currently in use.
  Tobacco use screen due yearly for all ages.

* END *
Press <RET> to continue, ^ to exit, or select component: ^
```

Reminders and Health Summary

Health Summary on Reports Tab in CPRS

When you open the Reports tab, select Health Summary, and then select a Type that has reminder components defined for it.

The screenshot shows the VistA CPRS interface. The title bar indicates the user is Green, Joann (DHCP SERVER). The menu bar includes File, Edit, View, Tools, and Help. The patient information section shows TEST, JAMIE (111-22-3333, Oct 10, 1910 (89)), Provider: GREEN, JOANN, Primary Care Team Unassigned, Attending: Brown, Clinician, Remote Data, and No Postings.

The Available Reports list on the left includes Health Summary, Imaging, Lab Status, Blood Bank Report, Anatomic Path Report, Dietetics Profile, Nutritional Assessment, and Vitals Cumulative. The Types list includes Rem Cm for Va, Rem Cr for Va, Reminders Test (1), Reminders Test (2), and Reminders Test (3).

The main display area shows the Health Summary - Reminders Test (3) report. The report header is: ***** CONFIDENTIAL REMINDERS TEST (3) SUMMARY pg. 1 ***** TEST, JAMIE 111-22-3333 1A B-3 DOB: 1. The report content is: ----- CM - Reminder Maintenance ----- The following disease screening, immunization and patient education recommendations are offered as guidelines to assist in your practice. These are only recommendations, not practice standards. The appropriate utilization of these for your individual patient must be based on clinical judgment and the patient's current status.

	--STATUS--	--DUE DATE--	--LAST DC
Breast Cancer Screen	N/A		unknown
Applicable: Due every 0Y - Not Indicated for all ages. Date of last mammogram/screen unknown.			
Pap Smear	N/A		unknown
Applicable: Due every 0Y - Not Indicated for all ages. No record of cervical cancer screen taxonomy on file Pap smear screen not indicated for women over 65.			
Cholesterol Screen (Female)	N/A		unknown

The bottom of the interface shows a tabbed menu with Cover Sheet, Problems, Meds, Orders, Notes, Consults, D/C Summ, Labs, and Reports. The Reports tab is currently selected.

Reminder Reports

Reports allow you to verify diagnoses, verify that appropriate treatment was given, identify patients requiring intervention, and validate effectiveness of care. Currently, there are three clinical reminders report options: *Reminders Due*, *Extract EPI Totals*, and *Extract EPI List by Finding and SSN*. The EPI extract finding reports are specific to the Hepatitis C Extract project.

Reminders Due Report

For a selected reminder, the report lists any reminders that are currently due. Reports can be defined by the following criteria:

- Individual Patient
- Hospital Location (all patients with encounters)
- OE/RR Team (all patients in team)
- PCMM Provider (all practitioner patients)
- PCMM Team (all patients in team)

A **summary** report displays totals of how many patients of those selected have reminders due. *The summary report may be run for several reminders.*

A **detailed** report displays patients with reminders due, in alphabetical order. The report displays for each patient the date the reminder is due, the date the reminder was last done, and next appointment date. The detailed report can also list all future appointments, if specified.

Detailed reports for Location or Provider may also be sorted by next appointment date.

Reports by Hospital Location, Provider, or Team print a separate report for each Hospital Location, Provider, or Team selected. Reports for all Hospital Locations are not separated by individual locations.

The report by Hospital Location can report either current inpatients or admissions within a selected date range. *The detailed report can only include one reminder.*

Report templates

The selection criteria used for the Reminders Due reports may be saved into a report template file, with a user-specified identifier, as the report is being run.

When running the Reminder Due report, you may select from an existing template and run a new report using the parameters from the selected template. The prompts for date range and sort order are displayed, but all other parameters are taken from the previous report. If you select a print template, you may also edit the template and/or copy to a new template before running the report.

Reminder Reports

Uses for Reminder Reports

Clinical Reminder reports can be used for many purposes, including the following:

- Patients in a panel or a clinic who have a reminder due
- Aggregate reporting
- Patient-specific reports for intervention
- Inpatients with a reminder due
- Intervention prior to discharge
- Identify patients who will be in clinic in the next month who need an intervention
- Identify patients who have left the clinic in the past week who missed having an intervention
- Identify patients with a lab finding but no diagnosis made
- Employee Health Tracking
- Inpatient education, exams, immunizations
- Reports on patients eligible for a study
- Identify high risk patients
- Disease-specific reminders: HCV, HIV, Melanoma, Diabetes

Reminder Reports

Summary Report by PCMM Provider

This report lists the total number of reminders due for patients allocated to a provider within PCMM. The summary report may be run for several reminders. (The detailed report can only include one reminder.) A future date may be entered if a report of reminders becoming due is required. Today is the default date.

Example:

```
Select Reminder Reports Option: D  Reminders Due Report

Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team
PATIENT SAMPLE: L// PCMM Provider

Select PROVIDER: DEAN,TOM          TD
Select another PROVIDER: <Enter>
  Select one of the following:
    P      Primary care assigned patients only
    A      All patients on list

PRIMARY CARE ONLY OR ALL: P// All patients on list
Enter EFFECTIVE DUE DATE: Apr 08, 2000//<Enter>  (APR 08, 2000)
  Select one of the following:
    D      Detailed
    S      Summary

TYPE OF REPORT: S// <Enter> Summary
Select REMINDER: MAMMOGRAM
Select REMINDER: VA-WEIGHT
Select another REMINDER: VA-BLOOD PRESSURE CHECK
Select another REMINDER: <Enter>

DEVICE: HOME//  <Enter> ALPHA

Evaluating reminders done
```

Reminder Reports

Summary Report by PCMM Provider, cont'd

```

Apr 08, 2000 5:09:08 pm Page 1

Clinical Reminders Due Report - Summary Report
Report Criteria:
  Patient Sample:      PCMM Provider
  PCMM Provider:      DEAN,TOM
  All/Primary:        All patients on list
  Effective Due Date : 4/08/2000
  Date run:           4/08/2000 5:06:54 pm

Enter RETURN to continue or '^' to exit: <Enter>

Apr 08, 2000 5:09:11 pm Page 2

Clinical Reminders Due Report - Summary Report for 1/20/2000

# Patients with Reminders
  Applicable      Due
  -----      ----
1  Mammogram           0          0
2  Weight              8          6
3  Blood Pressure Check 8          7

Report run on 8 patients.

End of the report. Press ENTER/RETURN to continue...
```

The column Applicable excludes patients (e.g. dead or non-diabetic) that the reminder did not apply to, based on the patient cohort logic in the reminder. Excluded patients are included in the "Report Run on" total.

Reminder Reports

Detailed report by PCMM Provider (Next Appointment only)

This report provides details of patients with reminders due who are allocated to a provider within PCMM. This example report displays only the next appointment for each patient.

```
Select Reminder Reports Option: D Reminders Due Report
Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team
PATIENT SAMPLE: L// PCMM Provider
Select PROVIDER:   DEAN,TOM      TD
Select another PROVIDER: <Enter>
  Select one of the following:
    P      Primary care assigned patients only
    A      All patients on list
PRIMARY CARE ONLY OR ALL: P// All patients on list
Enter EFFECTIVE DUE DATE: Jan 20, 2000// <Enter> (JAN 20, 2000)
  Select one of the following:
    D      Detailed
    S      Summary
TYPE OF REPORT: S// Detailed
Display All Future Appointments: N//<Enter> O

Sort by Next Appointment date: N//<Enter> O

Select REMINDER: VA-BLOOD PRESSURE CHECK

Create a new report template: N//<Enter> O

DEVICE: HOME// <Enter> ANYWHERE      Right Margin: 80// <Enter>

Evaluating reminders done

                                Jan 20, 2000 5:17:29 pm Page 1

      Clinical Reminders Due Report - Detailed Report
Report Criteria:
  Patient Sample:      PCMM Provider
  PCMM Provider:      DEAN,TOM
  Reminder:           VA-BLOOD PRESSURE CHECK
  Appointments:       Next Appointment only
  All/Primary:        All patients on list
  Effective Due Date : 1/20/2000
  Date run:           1/20/2000 5:16:32 pm

Enter RETURN to continue or '^' to exit: <Enter>
```

Reminder Reports

Detailed Report by Provider, cont'd

Jan 20, 2000 5:17:32 pm Page 2			
Clinical Reminders Due Report - Detailed Report for 1/20/2000			
Blood Pressure Check: 7 patients have reminder due			
		Date Due	Last Done
		-----	-----
1	DINARO,MUCHO (3779)	8/28/1998	8/27/1998
2	ESSTEPON,GLORD (3234)	1/20/2000	N/A
3	HOLMES,SHERLOCK (5377)	1/20/2000	N/A
4	HOOD,ROBIN (2591P)	8/19/1999	8/18/1999
5	MARLEY,JACOB (5678)	9/4/1998	9/3/1998
6	TEST,KEVIN (5734)	2/3/1999	2/3/1997
7	TRAT,JACK (2342)	1/20/2000	N/A
Report run on 8 patients.			
Applicable to 8 patients.			
End of the report.			
Press ENTER/RETURN to continue...			

The date the reminder is due, date last done, and next appointment date are displayed for each patient.

NOTE: The Reminders Due Report now displays “See below” if future appointments exist outside of the selected location and the “Display All Future Appointments” option is being used.

Reminder Reports

Detailed Report by Individual Patient (All Future Appointments)

All future appointments for each patient can be reported on the detailed report. This example is of a detailed report that lists individual patients who will have the Weight reminder due based on Future Appointment selected date ranges.

```
Select Reminder Reports Option: D Reminders Due Report
Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team
PATIENT SAMPLE: L// Individual Patient
Select PATIENT: TEST,KEVIN      12-5-48      432325734      SC VETERAN
Select another PATIENT: NEW,PATIENT      4-4-11      333221234      MILITARY RETIREE
Select another PATIENT: ABC,PATIENT      2-22-42      222324321      YES      ACTIVE DUTY
Select another PATIENT: <Enter>

Enter EFFECTIVE DUE DATE: Jun 14, 2000// T+30 (JUL 14, 2000)
  Select one of the following:
    D      Detailed
    S      Summary
TYPE OF REPORT: D// <Enter>etailed
Display All Future Appointments: N// YES

Select REMINDER: VA-WEIGHT

Create a new report template: N//<Enter> O

DEVICE: HOME// <Enter> ANYWHERE      Right Margin: 80// <Enter>
Evaluating reminders done

                                Jun 14, 2000 10:23:04 am Page 1
          Clinical Reminders Due Report - Detailed Report
Report Criteria:
  Patient Sample:      Individual Patients
  Individual Patients:  NEW,PATIENT
                      TEST,KEVIN
                      ABC,PATIENT
  Reminder:            VA-WEIGHT
  Appointments:        All Future Appointments
  Effective Due Date :  7/14/2000
  Date run:            6/14/2000 10:19:34 am

Enter RETURN to continue or '^' to exit: <Enter>
```

Reminder Reports

Detailed Report by Individual Patient (All Future Appointments), cont'd

Jun 14, 2000 10:23:08 am Page 2				
Clinical Reminders Due Report - Detailed Report for 7/14/2000				
Weight: 3 patients have reminder due				
		Date Due	Last Done	Next Appt
		-----	-----	-----
1	ABC,PATIENT (4321)	6/21/2000	6/21/1999	7/01/2000
2	NEW,PATIENT (1234)	DUE NOW	N/A	None
3	TEST,KEVIN (5734)	2/3/2001	2/3/2000	2/3/2001
Report run on 3 patients.				
Applicable to 3 patients.				
End of the report. Press ENTER/RETURN to continue...				

NOTE: The Reminders Due Report now displays “See below” if future appointments exist outside of the selected location and the “Display All Future Appointments” option is being used.

Reminder Reports

Summary Report by Location

The report by hospital location evaluates reminders due for patients attending the selected hospital location within a range of dates. If a prior date range is selected, all patients with encounters are selected. If a future date range is selected, patients with appointments for the location are selected.

The reports for selected hospital locations list reminders due for each location separately. The report for all locations reports reminders due for all locations combined. Hospital Location, Clinic Stop, or Clinic Group code can be selected. Reminders due today are reported.

```
Select PCE Reminder Maintenance Menu Option: RP  Reminder Reports
D      Reminders Due Report
Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team

PATIENT SAMPLE: L// <Enter> Location

Select FACILITY: SALT LAKE CITY//<Enter>          UT          660
Select another FACILITY: <Enter>

  Select one of the following:
    HA      All Outpatient Locations (excluding wards)
    HAI     All Inpatient Locations (wards only)
    HS      Selected Hospital Locations
    CA      All Clinic Stops(with encounters)
    CS      Selected Clinic Stops
    GS      Selected Clinic Groups
Determine encounter counts for: HS// HS Selected Hospital Locations
LOCATION: CARDIOLOGY          TEDD,DR
Select another LOCATION: <Enter>
  Select one of the following:
    P      Previous Encounters
    F      Future Appointments
PREVIOUS ENCOUNTERS OR FUTURE APPOINTMENTS: P// <Enter> Previous Encounters
```

Reminder Reports

Summary Report by Location, cont'd

```
Enter ENCOUNTER BEGINNING DATE: 3/1/00 ((MAR 01, 2000))
Enter ENCOUNTER ENDING DATE: 4/1/00 (APR 01, 2000)
Select SERVICE CATEGORIES: AI//<Enter>
    Select one of the following:
        D      Detailed
        S      Summary
TYPE OF REPORT: S// <Enter> Summary
Select REMINDERS: VA-D
    1  VA-DIABETIC EYE EXAM
    2  VA-DIABETIC FOOT CARE ED.
    3  VA-DIABETIC FOOT EXAM
    4  VA-DIGITAL RECTAL (PROSTATE) EXAM
CHOOSE 1-4: 1  VA-DIABETIC EYE EXAM
Select another REMINDER: VA-BLOOD PRESSURE CHECK
Select another REMINDER: VA-WEIGHT
Select another REMINDER: <Enter>

DEVICE: HOME// <Enter> ANYWHERE    RIGHT MARGIN: 80// <Enter>

Sorting Encounters /
Evaluating Reminders done

                                         Apr 09, 2000 10:16:49 am  Page 1

                        PCE Reminders Due Report - Summary Report
Report Criteria:
    Patient Sample:      Location
    Location:            Selected Hospital Locations (Prior Encounters)
                        CARDIOLOGY
    Date Range:          3/1/00 to 4/1/00
    Date run:            04/9/00 10:15:34 am
    Service categories: AI
                        A - AMBULATORY
                        I - IN HOSPITAL

Enter RETURN to continue or '^' to exit: <Enter>
                                         Apr 09, 2000 10:16:57 am  Page 2

                        PCE Reminders Due Report - Summary Report
Facility: SALT LAKE CITY 660
Reminders Due for CARDIOLOGY for 3/1/00 to 4/1/00

                                         # Patients with Reminders
                                         Applicable      Due
                                         -----      ---
1    Diabetic Eye Exam                  19              19
2    Blood Pressure Check                32              32
3    Weight                             32              32

Report run on 32 patients.
```

Reminder Reports

Scenario: How many patients are not receiving reminders who should be for Hepatitis C?

A report can be prepared that compares “Applicable” reminders to those that have been defined as “Due.” The difference may be a missed opportunity. This can be done by individual provider or for all providers in a location or medical center, as a quality assurance measure. The example below shows a summary report where the reminders selected are all related to Hepatitis C. This illustrates how you could use the summary report as part of a larger strategy for implementing and managing a Hepatitis C guideline using reminders.

Example Report

	# Patients with Reminder	
	Applicable	Due
	-----	---
Hep C Risk Factor Screen	172	16
Hep C Test for Risk	30	7
Hep C Diagnosis Missed	0	0
Hep C Diagnosis	36	36
Hep C- Dz & Trans Ed	36	27
Hep C - Eval for Rx	36	15
Chr Hep - Hep A Titer	45	3
Hepatitis A Vaccine	19	4
Chr Hepatitis - AFP	12	4
Chr Hepatitis - U/S	13	6
Report run on 175 patients.		

Creating a Working Clinical Reminder

Although most clinicians won't be required to create their own reminders, they can help the Clinical Reminders managers define and customize them for specific needs. Having a basic understanding of the components of a reminder and how they work is useful knowledge. The following is a brief introduction. Detailed instructions are provided in the Clinical Reminders Manager Manual.

Two parts to creating a working clinical reminder

1. Creating the *reminder definition*, which describes who the reminder applies to, how often it is given, and what resolves or satisfies the reminder.
2. *Process issues*. These include who will use the reminder and how the data will be captured. The process issues are extremely important — if they are not worked out, the reminder will never work, even if the definition is correct.

Steps to create a working reminder

1. Write the reminder definition in a narrative format. Determine what characteristics the reminder will have (make a list). Which patients will the reminder be applicable for: age ranges, sex, diagnoses, etc. What satisfies the reminder and what makes it not applicable: diagnoses, lab results, x-rays, education, etc.

Reminders provide answers to the basic questions:

- WHO (Patient Cohort Logic)
- WHY (Clinical Maintenance)
- WHAT (Resolution Logic)
- WHEN (Frequency)
- WHERE (Location where activity occurred)

Example: Diabetic patients should have a diabetic eye exam done yearly.

2. Review existing reminders to see if there is one that is close that you can copy and modify.
3. Copy the existing reminder and edit it to meet your needs, or define a new reminder.
4. Create new findings if they are required. For example, you may need exams or health factors.
5. Test your reminder definition by evaluating the reminder for test patients.
6. Create a reminder dialog, if desired, for resolving the reminder in CPRS.
7. Once you are certain the reminder works as intended, set it up in Health Summary, Encounter Form, and/or CPRS.

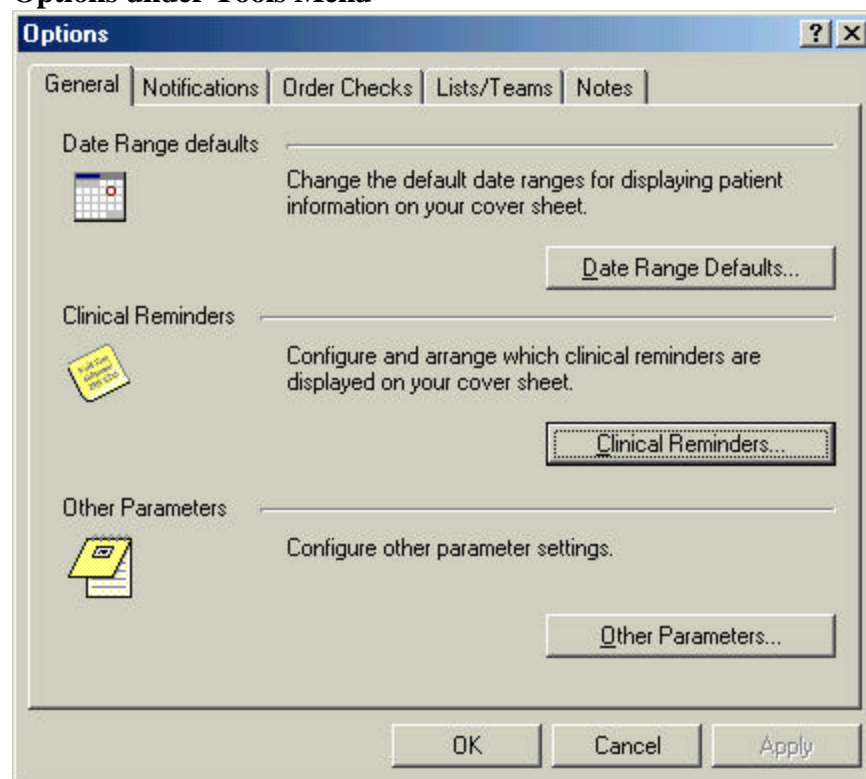
Changing Clinical Reminders Cover Sheet Settings

You can change the list of reminders that appear on the Cover Sheet from two places:

- Action Menu in Available Reminders window
- Options under Tools Menu

If you click on the Reminders button, the Available Reminders window opens, as described on page 8 in this manual. Select the Action menu, and then select Edit Cover Sheet Reminders List. You can also reach this same option from the Tools menu on the Cover Sheet, then selecting Options, and then Reminders.

Options under Tools Menu



Click on Clinical Reminders to configure reminders or to arrange which clinical reminders are displayed on the Cover Sheet.

A parameter setting determines which of two dialogs you will see:

- Clinical Reminders on Cover Sheet
- Clinical Reminders and Reminder Categories Displayed on Cover Sheet

Your Clinical Coordinator sets the reminders parameter.

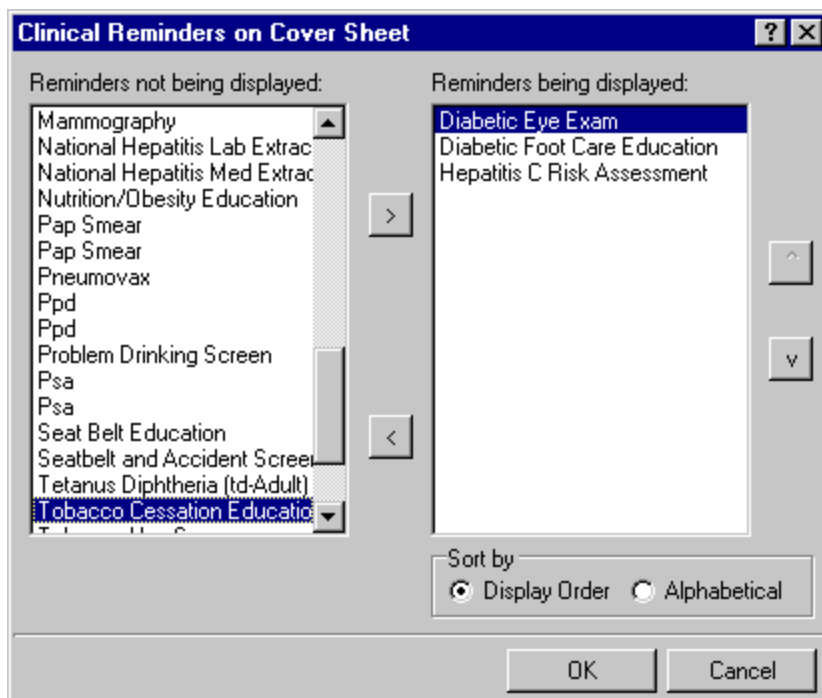
Changing Clinical Reminders Cover Sheet Settings

Clinical Reminders on Cover Sheet

From the dialog, highlight an item in the **Reminders not being displayed** field and then click the Add arrow “>” to add it to the **Reminders being displayed** field. You may hold down the Control key and select more than one reminder at a time. When you have all of the desired reminders in the **Reminders being displayed** field, you may highlight a reminder and use the up and down buttons on the right side of the dialog to change the order in which the reminders will be displayed on the Cover Sheet.

Sort by

Select Display Order to display the reminders in the order that you choose. Click Alphabetical to have the reminders displayed in alphabetic order.



Clinical Reminders and Reminder Categories Displayed on Cover Sheet

This advanced dialog provides more management capabilities than the first dialog. The dialog consists mainly of three large list areas.

- *Cover Sheet Reminders (Cumulative List)* displays selected information on the Reminders that will be displayed on the Cover Sheet.
- *Available Reminders & Categories* lists all available Reminders and serves as a selection list.

Changing Clinical Reminders Cover Sheet Settings

- *User Level Reminders* displays the Reminders that you have added to or removed from the cumulative list.

You may sort the Reminders in *Cover Sheet Reminders (Cumulative List)* by clicking on any of the column headers. Click on the Seq (Sequence) column header to view the Reminders in the order in which they will be displayed on your cover Sheet.

An icon legend is displayed to the right of *Cover Sheet Reminders (Cumulative List)*.

- Folder icon represents a Reminders Category
- Red alarm clock represents an individual Reminder.
- Plus sign in the first column means a reminder has been added to the list
- Minus sign in the first column means a reminder has been removed from the list
- Padlock icon means you can't remove reminder (mandatory)

Clinical Reminders and Reminder Categories Displayed on Cover Sheet

Cover Sheet Reminders (Cumulative List)			
Reminder	Seq	Level	
+ [Red Alarm Clock] Advanced Directives Educa...	10	System	
+ [Red Alarm Clock] Alcohol Abuse Education	20	System	
+ [Red Alarm Clock] Antrys Agetest	30	System	
[Red Alarm Clock] Blood Pressure Check	10	Division	Salt Lake Oifo
+ [Red Alarm Clock] DIQ Test	20	Division	Salt Lake Oifo
+ [Folder] Chronic Pain	10	Service	MEDICINE
[Red Alarm Clock] Drug Class Test	10	Location	2B MED
[Red Alarm Clock] Mammogram	10	User Class	CLINICAL COORDINATOR
+ [Red Alarm Clock] Mental Health Test	20	User Class	CLINICAL COORDINATOR
+ [Red Alarm Clock] Diabetic Eye Exam	10	User	NOWLING,SCOTT
+ [Red Alarm Clock] Diabetic Foot Exam	20	User	NOWLING,SCOTT

Location shown in Cumulative List: 2B MED

Editing Cover Sheet Reminders for User: NOWLING,SCOTT

Available Reminders & Categories		User Level Reminders	
			Seq
[Red Alarm Clock] VA GENERIC Test			
[Red Alarm Clock] Vitals Test			
[Red Alarm Clock] WPB Education Test			
[Red Alarm Clock] Weight			
[Red Alarm Clock] Weight and Nutrition Screen			
[Red Alarm Clock] pNEUMOVAX			
+ [Folder] A NEW			
+ [Folder] Acute Pain			
+ [Folder] Cancer Pain			

+ [Red Alarm Clock] Diabetic Eye Exam	10
+ [Red Alarm Clock] Diabetic Foot Exam	20
- [Red Alarm Clock] Antrys Agetest	30

Seq # 1

+ Add
- Remove

OK Cancel Apply

Changing Clinical Reminders Cover Sheet Settings

Cover Sheet Reminders (Cumulative List)

The Level column of the Cover Sheet Reminders (Cumulative List) field displays the originating authority of the Reminder, which can include System, Division, Service, Location, User Class, and User.

Reminders on this list that display a small gray padlock icon at the beginning of the line cannot be removed. These Reminders are mandatory. The Seq (Sequence) column defines the order in which the Reminders will be displayed on the Cover Sheet. If there are two or more Reminders with the same sequence number, the Reminders will be listed by level (System, Division, Service, Location, User class, User).

Location shown in Cumulative List

Click on this drop-down box and select a location. The Reminders assigned to that location (if any) appear on the Cumulative List.

Available Reminders & Categories

This area displays all of the Reminders and Categories available to the user. Categories are groups of related Reminders that can be added as a group. Highlight a Reminder or Category from the field and click the right arrow to add them to the User Level Reminders field.

User Level Reminders

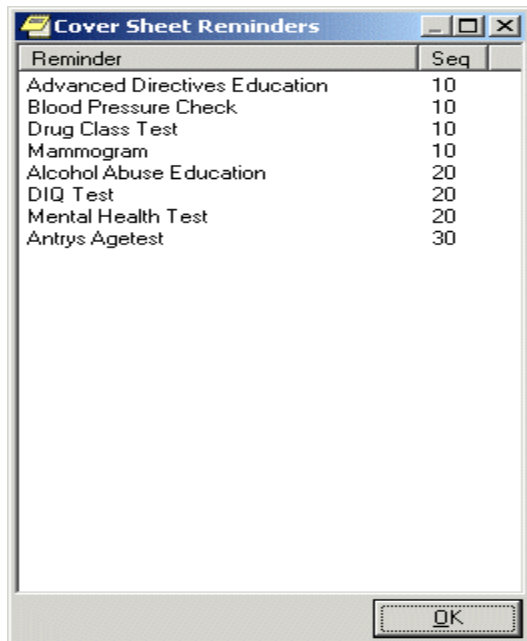
This area displays all of the Reminders selected by the user.

- To add a Reminder to your User Level Reminders, highlight the desired Reminder in the Available Reminders & Categories field and click the right arrow button.
- To delete a Reminder from your User Level Reminders field, highlight the Reminder in the User Level Reminders field and click the left arrow.
- To determine the order in which the Reminders will be displayed on the Cover Sheet, change the Reminder's Sequence number. For example, to place a Reminder at the top of the Reminders list, assign it a number less than 10.
- To change the order of User Level Reminders, highlight Reminders and click the up arrow or down arrow until the desired order is achieved.
- To remove any or all non-mandatory Reminders assigned at any level, add the Reminder to your User Level and then click the Remove button.

Cover Sheet Reminders

Once you have the Cumulative List as you want it, click **View Cover Sheet Reminders** to view how the reminders will be displayed on your Cover Sheet for the specified locations.

Changing Clinical Reminders Cover Sheet Settings



After you have made all of the desired changes to the Reminders that will be displayed on the Cover Sheet, click OK.

Creating Reminder Dialog Templates

Templates can be linked to Reminder dialogs. This allows you to use templates to place orders, enter PCE information, and enter vitals and mental health data.

To create a Reminder Dialog, follow these steps:

On the Notes, Consults, or D/C Summ tab, bring up the Template Editor by selecting Options | Create New Template

1. In the Name field under Personal Template Properties, type in a name for the new template. Remember the template name requirements*. You should also make the name descriptive of the content for ease of use.
2. Click on the drop down button in the Template Type field and select Reminder Dialog.
3. Click on the drop-down button in the Dialog field and select the Reminder Dialog desired.
4. Place the template where you want it in the tree view.
 - a. Click the plus sign next to an item to see the objects under it.
 - b. Drag-and-drop the template where you want it in the tree. (Or use arrows below the personal templates tree view.)
5. To save the template, click Apply. To save and exit the editor, click OK.

NOTE: You don't have to click Apply after each template, but it is recommended because if you click Cancel, you will lose all changes you have made since the last time you clicked Apply or OK.

Only Reminder Dialogs that are listed in the TIU Reminder Dialogs parameter can be linked to templates. If there are no Reminder Dialogs in this parameter, the Reminder Dialog template type will not be available.

*Template Name Requirements

The template you are creating is automatically called "New Template," and you must rename it. Template names must begin with a letter or a number, be between 3 and 60 characters in length (including spaces), and can't be named "New Template." Give the template a meaningful name to help you remember its contents and to allow searching for the first word in the name.

Glossary

All Evaluated

A reminders folder in the tree view that contains all the reminders that have been evaluated for this patient.

Applicable

The patient meets all the conditions for the reminder, but the appropriate time has not elapsed. In order for a reminder to be applicable, the patient cohort findings defined in the reminder must have been found. For example, a flu shot is given once a year to patients 55 and older, but it has not been a year since the 58-year-old patient received his last flu shot.

Dialog

A dialog is a list of items/actions/sentences that can be used to collect patient data and create Progress Note text. By clicking on checkboxes, you can indicate what actions were taken during an encounter. These dialog items are based on guidelines at your site and how your Reminder Managers define the reminders and dialogs

A dialog is an entry in the Reminder Dialog file. The entry may be a dialog element, a dialog group, an additional prompt, a result element, or a result group. (*See the Reminder Dialog definition in this glossary for more information.*)

Drawer

Drawers are what we call the buttons on the Notes screen for Templates, Reminders, and Encounters. After you begin a new note, you will see the Reminders button or “drawer.” Click to open the drawer and see a tree view of reminders that are due, applicable, not applicable, all evaluated reminders, and other reminders.

Due

The patient meets all the conditions for the reminders and the appropriate amount of time has elapsed. In order for a reminder to be due, the patient cohort findings defined in the reminder must have been found, and the resolution findings must have not been found within the required frequency. For example, if a rectal exam should be given every 2 years for male patients over 50 years old, the reminder will be due for male patients, over 50 years old, where it has been over 2 years since the last rectal exam or there is no exam on file.

Findings

Data from **VISTA** packages (Lab, Mental Health, PCE, Pharmacy, Radiology, Vitals, etc., and Computed Findings) are called Findings. Findings are used to define the Patient Cohort Logic and Resolution Logic and to provide relevant clinical information.

Glossary

Finding Types

Drug Education Topic, Exam, Health Factor, Immunization, Laboratory Test, Mental Health Instrument, Orderable Item, Radiology Procedure, Reminder Computed Finding, Reminder Taxonomy, Reminder Term, Skin Test, VA Drug Class, VA Generic, and Vital Measurement.

Health Factors

Patient information that can't be coded, such as Alcohol Use, Binge Drinking, Current Non-Smoker, Current Smoker, Currently Pregnant, Family Hx of Alcohol Abuse, Lifetime Non-Smoker, No Risk Factors For Hep C, etc.

Not Applicable

A reminders folder in the tree view that contains reminders for the patient in which the patient doesn't meet all the conditions for the reminders.

Other Categories

One of the reminder folders in the Reminders Drawer on the Notes or Consults tabs in CPRS. It contains reminders that have not been evaluated for the selected patient, but have been defined as part of a Reminder Category.

Patient Cohort

A group of patients that meet the defined criteria (Patient Cohort Logic) for a reminder. In other words, if the reminder is applicable, the patient is in the cohort.

Reminder Categories

A category defines a group of reminders and may include other sub-categories. Categories appear in the Other Categories folder in the Notes and Consults tabs of the CPRS GUI. Categories can be based on medical service, disease process, or clinician.

Resolve, Reminders Resolution

Recording or taking action that satisfies a reminder. For example, if a reminder exists for influenza immunization, giving a flu vaccine satisfies or resolves that reminder. Likewise, ordering lab tests or drugs or giving patient education can resolve a reminder.

Taxonomy

Coded data such as diagnoses or procedures with ICD or CPT codes. Reminder taxonomies provide a convenient way to group coded values and give them a name. For example, the VA-DIABETES taxonomy contains a list of diabetes diagnoses.

Glossary

Term

Reminder terms provide a way to define a general term, for example diabetes diagnosis, which can be linked to specific findings.

Tree View

A hierarchical view of folders and reminders that you see when you press the Reminders button. You get a similar view when the reminders drawer is open. It shows the reminders divided into the Due, Applicable, Not Applicable, All Evaluated, and/or Other Categories folders.







Glossary – Status Definitions

Clinical Reminder Statuses

When you look at the reminder output in CPRS and in Health Summaries, you will see a reminder status. The status is determined by evaluation of the PATIENT COHORT LOGIC and/or RESOLUTION LOGIC. These logic strings in turn depend on the other fields in the reminder definition, which are stored in the REMINDER DEFINITION file #811.9. The descriptions in the table below explain what each of the possible statuses mean.

Status	Description
DONE	When the final frequency for a reminder is 99Y (99 years), it is done once in a lifetime. When reminders with this frequency are resolved, they have the special status of DONE.
DUE NOW	There are two conditions that can make a reminder DUE NOW. The first is when the reminder has never been resolved in the past. The second is when the reminder has been resolved in the past but the amount of time specified by the final REMINDER FREQUENCY has been met or exceeded. For example, if the reminder was last resolved 18 months ago and the frequency is one year, the reminder is DUE NOW. If the frequency was 2 years, the status would be RESOLVED.
DUE SOON	The field DO IN ADVANCE TIME FRAME is used to let a reminder become due earlier than the date determined, by adding the frequency to the date when the reminder was last resolved. For example, if the frequency is 1Y (one year) and the DO IN ADVANCE TIME FRAME is 1M (one month), the reminder would have a status of DUE SOON beginning 11 months after it was last resolved. After one year has passed, the status would be DUE.
ERROR	This status is returned when there is an error that prevents the reminder from being properly evaluated. Depending upon how a site chooses to set things up, a MailMan message containing details of the error will be sent either to a mailgroup or the user. The error will also be put into the error trap.
N/A	A reminder is N/A (non-applicable) if the patient is not in the cohort or group of patients to which this reminder applies. The PATIENT COHORT LOGIC provides a precise description of the cohort. Examples of Findings that can be used to determine the cohort include sex, age, and diagnosis. The remaining resolution statuses apply only to reminders that are applicable.
NEVER	This status applies only to reminders that are resolved by an immunization. Immunizations can be marked as contraindicated in the V IMMUNIZATION file. When this is the case, the reminder will have the status of NEVER.
RESOLVED	A reminder is given a status of RESOLVED when all the criteria in the RESOLUTION LOGIC have been met and the amount of time specified by the reminder frequency has not passed. The criteria can be simple, such as having an immunization, or complex, such as an order for an inhaler and inhaler use education.

Glossary – Icon Definitions

Icon	Description
	Red, ringing alarm clock means that a reminder is due. When present on the reminders button, there is at least one reminder due.
	Blue, non-ringing alarm clock means that a reminder is not due, but applicable. When present on the reminders button, there is at least one applicable reminder, and there are no reminders due.
	Wall clock means that a reminder is not applicable. When present on the reminders button, there is at least one reminder that is not applicable, and there are no reminders that are due or applicable.
	Question mark means that a reminder's status of due, applicable or not applicable has yet to be evaluated. When present on the reminders button, no available reminders have been evaluated. This typically happens when cover sheet reminders are not defined or have not yet been evaluated.
	Present only in the reminders tree, a dialog icon is displayed in the lower right hand corner of a clock icon when there is a reminder dialog associated with that reminder.
	Present only in the reminders tree, a dialog icon, with a check mark over the dialog, is displayed in the lower right hand corner of a clock icon after the reminder dialog associated with that reminder has been processed. When these reminders are re-evaluated, the check mark is removed.

FAQs & Tips

Q: What is the difference between the exported Clinical Reminders that have an asterisk (*); e.g. VA-*SEAT BELT AND ACCIDENT SCREEN and ones that don't: e.g., VA- SEAT BELT EDUCATION

A: The asterisk (*) identifies the reminders related to the National Center for Health Promotion. They were created based on the 13 issues identified by the National Center for Health Promotion in Handbook 1101.8. However, that handbook has been replaced by Handbook 1120.2 ("HEALTH PROMOTION AND DISEASE PREVENTION PROGRAM"). You can retrieve a copy from the VA publications pages on the web.

<http://vaww.va.gov/publ/direc/health/handbook/1120-2hk.doc>

Most of the other reminders beginning with VA- were created with input by the "Ambulatory Care Expert Panel" which no longer exists.

Q: Are the reminders our site has already defined compatible with the new Clinical Reminders V. 1.5 package?

A: Yes, a conversion utility is run when the package is installed that converts your reminders to the new file structure. Be sure to follow the instructions in the Installation Guide to set a few important parameters.

Q: Can we use the reports functionality "out of the box" as soon as we install V. 1.5, or do we have to define reminders first?

A: Reports can be run on the National reminders that are distributed "out of the box," but National reminders will not include local findings so the report counts will not be correct. Once local reminders are defined and tested, you will primarily run the reports based on site-specific reminders.

Q: If orders are included in dialogs and I check these through the Notes tab in CPRS, are the orders actually placed, or is this just recording the intention to order something?

A: The order is actually placed, just as if you had ordered through the Orders tab. If the order is set up as a quick order, it will go through immediately (when you click the Finish button); if not a quick order, further questions will be asked to complete the order. The order will still need to be signed.

FAQs & Tips

Q: When I click on a reminder to process, I get a message saying “no dialog is defined for this reminder.” What does this mean and what do I need to do?

A: See your CAC or Clinical Reminders manager. They need to create and link a dialog for this reminder.

Q: What do clinicians need to learn to use the new Clinical Reminders functionality?

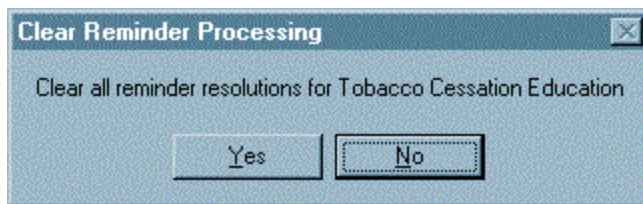
A: The most important things to learn will be related to changes in workflow. It will be important to coordinate orders that are placed through reminder dialogs with nurses and clerks. You can work with your CACs and teams to share the responsibility for reminders so that no individual is overwhelmed with reminders. Also, learning to use reports correctly to produce meaningful data will be essential.

Tips

Clearing a Single Reminder

You will probably process several reminders for a single visit. If you have entered information on a reminder, but you need to start over on that reminder only, you can click Clear on the reminder from the Reminders Drawer, then click the Clear button in the Reminders dialog box. This removes all previous dialog selections from the reminder's dialog box and removes the related text and data from the Progress Note Text box and the PCE data box for this reminder. You can now start processing again.

NOTE: Clicking Clear will remove the information from only one reminder. Be careful that you are on the correct reminder before you click Clear.



Canceling Out of the Processing Dialog

If you reach the Reminders processing dialog by mistake or you wish to delete information that you have entered and start over, click Cancel.

NOTE: If you click Cancel, you will lose all of the information for reminders that you have entered.

